C4725-2

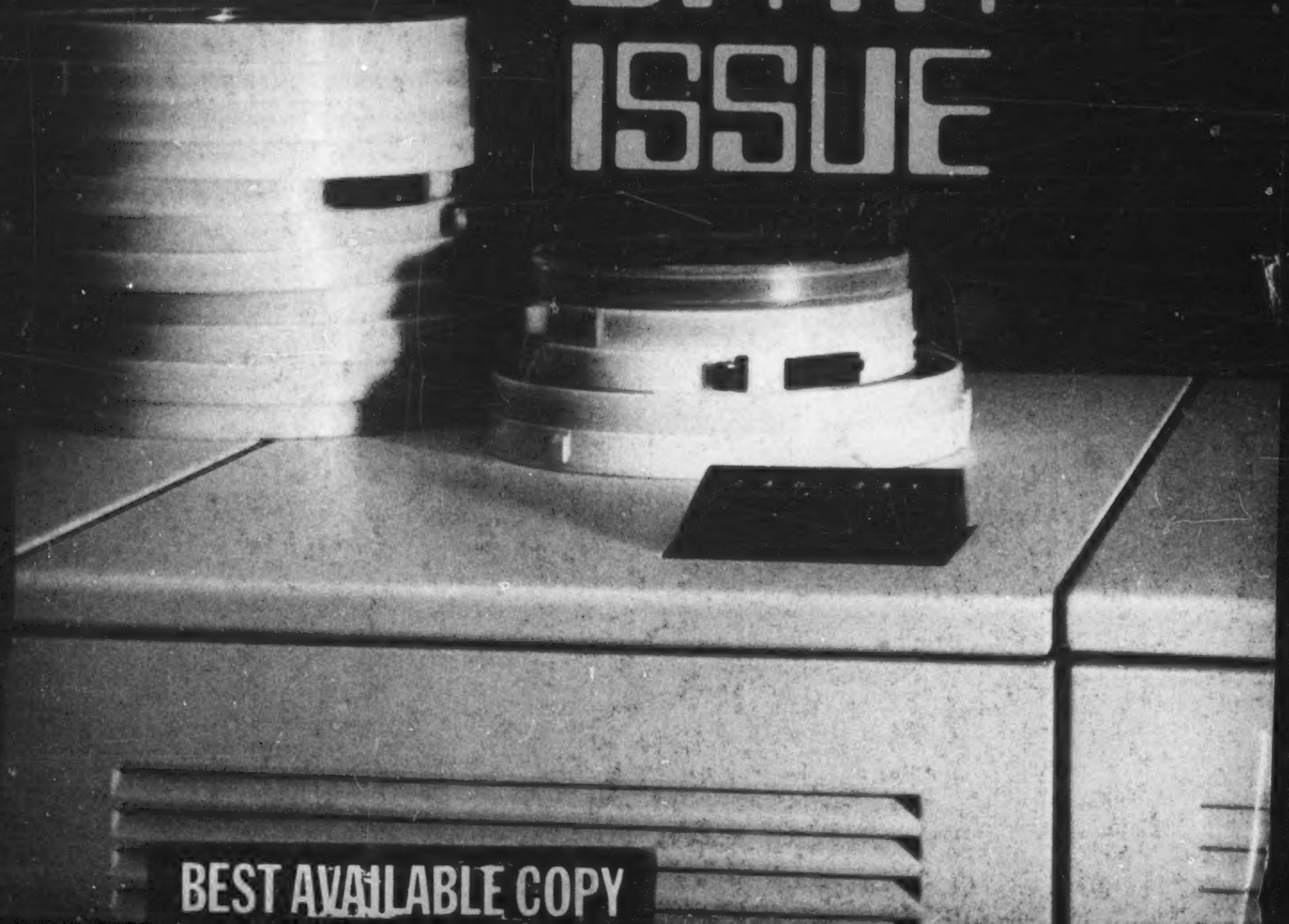
11/23/82

OCTOBER 29, 1982

Lawn&Garden Marketing

A20800-----SHWEA5200 XXXXX LGN
F00100820000000XLB NY2
ANDREA SCHWARZ
CONGRESSIONAL INFO SERV
4520 EAST WEST HWY
BETHESDA MD 20814

MARKET DATA ISSUE



BEST AVAILABLE COPY

EDITORIAL
Wendall Burns, Editor
Marjorie Riggin, Associate Editor
Kimberly A. Sipes, Editorial Assistant
Pat Blanton, Source Book Editor
Kevin Callahan, Art Director
Anita Blattner, Graphic Designer

CIRCULATION
John C. Arnst, Director
Evelyn Rogers, Manager
Dee Manies, Reader Correspondent

Member of
American
Business press

ABP

Member of Business
Publications Audit
of Circulation, Inc.

BPA

ADMINISTRATION
R. J. Hancock, President
John Wickersham, Publisher

ADVERTISING
Jane Brooksher, Marketing Coordinator
Jean Jones, Production Manager
Production Sales—See
Regional marketing office
listing on Classified Ad
page.

Lawn & Garden Marketing (USPS 306-340) formerly Lawn/Garden/Outdoor Living with which is combined Modern Garden Center) is published by Intertec Publishing Corp., 9221 Quivira Road, Overland Park, KS 66212.

Subscription qualification or price: Publication is mailed free in the U.S. and Canada only to qualified persons in retail or wholesale businesses responsible for buying and merchandising product lines and services related to landscaping, gardening, turf, patio, indoor plants and leisure living. Non-qualified subscriptions are $24 a year in the U.S. and $30 in Canada and other countries.

Single copy price $2 plus postage and handling. Back issue price, $3 plus postage and handling. Adjustments necessitated by paid subscription termination at single copy rate. Allow 6-8 weeks for change of address or for new subscription processing.

Subscriptions and subscription correspondence should be sent to P.O. Box 12901, Overland Park, KS 66212-0930. **Second class postage** paid at Shawnee Mission, KS. 66212.

Publishing dates are as follows: Monthly January through April, one issue each in June, August, October and November. Two issues in September.

INTERTEC PUPLISHING CORP.

OCTOBER 29, 1982 VOL. 21 No. 9 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.

GARDEN DEPT

4 **Industry trends, size...and the role of distributors.** As presented to NLGDA at their annual meeting, an analysis of the lawn and garden distributor role in today's market.

32 **Product Movement Report—Summer, 1982.** Robust gains in some categories were counterbalanced by low sales in others.

40 **Vegetable gardeners still 38 million strong.** The 1982 Gardens for All/Gallup National Survey shows that food gardening has reached a plateau; lawn care activities are down from 1981.

46 **Executive Forum:** Warner Frazier, president of Simplicity Manufacturing Co. and of the OPEI, responds to LGM questions.

56 **New Markets: Urban/rural lifestyles.** City ways and income come to the country, new U.S. Census data show.

60 **Are major lawn and garden products on a roll?** Green goods, BBQ equipment and casual furniture all show firm, forward momentum.

68 **Measuring lawn care services.** A survey of commercial lawn service operators.

84 **Plant sales below expectations.** Data for 1982 from AAN.

86 **Nonfarm fertilizer frequently misclassified.** Tonnage takes a dive, fiscal year 1980-1981.

88 **Identifying new market opportunities.** In a talk to AAN members, Jeffrey D'Eliscu, president of Rogers Gardens and of Plant Research Laboratories, discusses "opportunity."

93A **The ABC's of Kerosene Heaters.** Another in LGM's product knowledge series.

DEPARTMENTS

27 **Manufacturers' Literature**
28 **Green Scene**
46 **Executive Forum**
64 **Power Equipment Highlights**
74 **Product Briefs**
94 **Calendar**
96 **Distributor News**
106 **Potpourri**
108 **People on the Move**

Coming in November/December Issue: Trends in packaging chemicals and fertilizers for instant use and specific needs. Diesel vs. gasoline compact tractors: how and when to compare the two. A recap of major fall lawn and garden shows. The ABC's of Specialty Fertilizers—another pull-out for point-of-sale use.

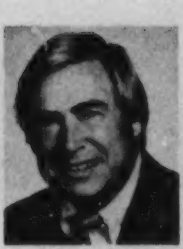
Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

Copyright 1982 INTERTEC PUBLISHING CORP. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, mechanical, electronic, photocopying, recording or otherwise without the prior written permission of the publisher. For information, address John Wickersham, 9221 Quivira Road, Overland Park, KS 66212.

Photocopy rights: Permission to photocopy for internal or personal use is granted by Intertec Publishing Corp. for libraries and others registered with the Copyright Clearance Center (CCC), provided the base fee of $2.00 per copy of article is paid directly to CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to publisher. ISSN 0091-4665/81: $2.00 + 0.00.

Industry trends, size... and the role of distributors



Market size, industry trends, and the role of distributors in serving the lawn and garden market, were described to members of the National Lawn & Garden Distributors Assn. at their annual meeting in September by Dr. Charles Greenidge. A management consultant, Dr. Greenidge has done in-depth studies of lawn and garden distribution and provided data and direction to NLGDA members for several years. Highlights of his 1982 presentation are reported here.

"The lawn and garden industry since 1970 has reported steady sales increases, with the year-to-year increases ranging from 5.9 percent to 18.9 percent. This growth trend during the 1980's experienced its first setback during the 1982 season.

"Last year, we projected 1982 season annual sales to reach $21.1 billion at retail. This was based upon a ten year trend, and it reflected a slowing in the growth rate from 18.9 percent to 14.5 percent over the prior year.

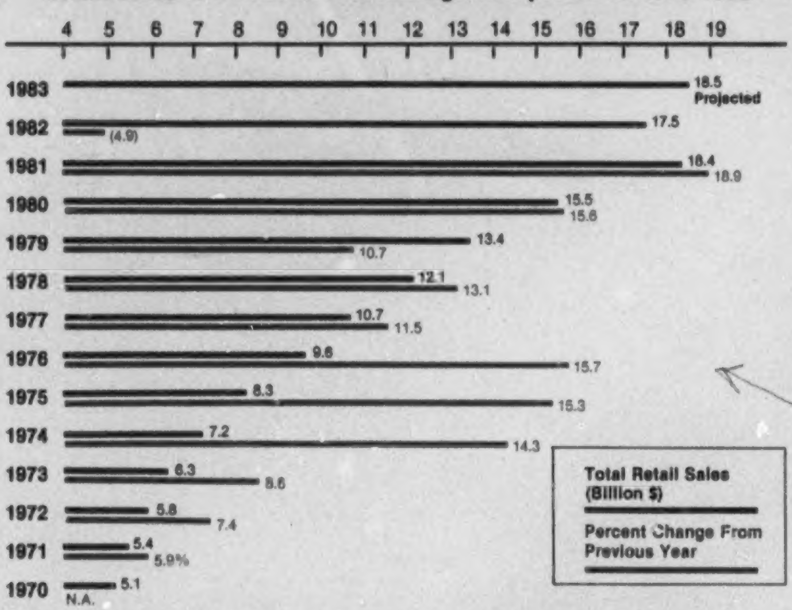
"However, the recession took its toll as it finally impacted a whole series of leisure products industries like: travel, sporting goods, restaurants, do-it-yourself hardware, jewelry, and the lawn and garden industry. Annual sales for 1982 totaled $17.5 billion at retail, which represents a 4.9 percent decline compared to 1981.

"The decline in unit volume in the lawn and garden industry between the 1981 and 1982 seasons is closer to 15 percent when you consider that price increases accounted for approximately 10 percent of the dollars generated. That is, if 1981 unit volume which represented $18.4 billion at retail was matched in 1982, sales would have reached $20.2 billion assuming unit volume remained level. Thus, the 1982 actual volume of $17.5 billion represents a $2.7 billion drop from the projected level unit volume of $20.2 billion for 1982. This represents a 14.7 percent drop in unit volume and the first sales reversal in 10 years.

"Few product categories in the lawn and garden industry escaped the impact of the recession. Only accessories, trim-a-tree, and snow removal equaled the 1981 sales levels. The balance of the product categories experienced sales declines

14-year sales data

Retail sales of selected lawn and garden products 1970-1982



Note: Lawn and Garden retail sales include: nursery stock (plants), power equipment, fertilizer, chemicals, tools, watering equipment, accessories, lawn furniture, trim-a-tree, snow removal.

Source: National on-site field studies and surveys of dealers and distributors, and calculations by Greenidge & Associates, Inc., 1976-1982

Retail volume — 10 product categories 1977-82

Billions dollars

	1977	1978	1979	1980	1981	1982
Nursery	$2.6	$2.7	$3.2	$3.8	$4.5	$4.2
Power Equipment	2.8	3.0	3.1	2.9	3.0	2.9
Fertilizers	1.2	1.4	1.5	1.7	2.1	2.0
Chemicals	1.5	1.9	2.1	2.6	2.9	2.8
Tools	.8	.8	.9	1.1	1.2	1.1
Watering Equipment	.7	.9	1.0	1.5	1.9	1.8
Accessories	.5	.5	.6	.6	.7	.7
Lawn Furniture	.3	.5	.4	.6	1.2	1.1
Trim-A-Tree	.2	.2	.3	.5	.6	.6
Snow Removal	.1	.2	.3	.2	.3	.3
Total	**$10.7**	**$12.1**	**$13.4**	**$15.5**	**$18.4**	**$17.5**

Source: Trade data, U.S. Government — proprietary studies by Greenidge & Associates Inc., 1976-1982.

Retail sales – Selected outlets 1977, 1979, 1981, 1982

	1977		1979		1981		1982	
Type of Outlet	Number of Outlets	Sales (Billion)	Number of Outlets	Sales (Billion)	Number of Outlets	Sales (Billion)	Number of Outlets	Sales (Billion)
Hardware Stores, Home Centers, Lumber Yards	32,848	$ 2.8	30,218	$ 3.9	28,121	$ 5.7	27,820	$ 5.4
L&G Centers, Nurseries, Feed & Seed	8,232	4.7	9,126	5.7	9,211	7.8	9,279	7.7
Chain Stores, Mass Merchandisers	13,435	3.2	11,372	3.8	10,137	4.9	9,272	4.4
Total	54,515	$10.7	50,816	$13.4	47,469	$18.4	46,371	$17.5

Source: Trade data, U.S. Government – proprietary studies, field research and calculations by Greenidge & Associates, Inc., 1976-1982.

Industry trends ...continued

with nursery stock and foliage dropping a record $300 million.

"Nursery stock and foliage sales have historically led the industry and served as one of the primary driving forces behind sales increases in the other product categories. Close monitoring of nursery stock sales in 1983 will be necessary to help project the expected sales in the other categories.

"At the present time we are projecting slight recovery in nursery stock sales followed by increases in the other related categories resulting in an estimated $18.5 billion annual sales for the 1983 season. This will bring industry sales to within $100 million of the 1981 levels.

"With a few notable exceptions, the industry at the vendor level is comprised of numerous smaller regional and national suppliers who produce a narrow or limited line of merchandise. Although there have been some recent acquisitions and mergers in the lawn and garden industry, a one-stop vendor still does not exist.

"One of the most significant trends over the past five years is the drop in the number of retail outlets which sell lawn and garden products from 54,515 in 1977 to 46,371 in 1982. This drop in the number of outlets is accounted for by a decline of 5,028 hardware/home center/lumber yards and 4,163 mass merchandisers/chain stores. During this same period, lawn and garden centers/nurseries/feed & seed stores increased by 1,047 retail outlets.

"In 1982, hardware sector retailers accounted for 60 percent of retail outlets handling lawn and garden products and 31 percent of total industry sales. Mass merchandisers and chain stores accounted for 20 percent of outlets and 25 percent of industry sales. The lawn and garden centers, nurseries, and feed & seed stores accounted for 20 percent of the industry's retail outlets and 44 percent of sales.

"Vendors and distributors alike must constantly monitor the changes that are occurring in the distribution of lawn and garden products so they can adapt their marketing and distribution to fit the present market opportunities."

Dealer's viewpoint

"Retailers' needs for lawn and garden products and services vary greatly depending upon the type of retail business being operated. This diversity of operations and expectations by the dealers further complicates the task facing the vendors and distributors.

"Mass merchandisers historically have keyed on lawn and garden as a seasonal business, which when promotionally priced would generate heavy customer traffic and sales. Typically lawn and garden took its specific place in the annual seasonal promotional calendar along with other categories like: 'Back-to-school,' 'Christmas,' 'Valentines Day,' and 'Easter.'

"As a result of this strategy, mass merchants developed model stocks of nationally or regionally recognized products which had been 'cherry-picked' from the industry as a whole. Departments and standard gondolas were merchandised with case lots of off-priced specials which were heavily advertised in local newspaper, radio and T.V.

"Almost without exception the mass merchant does not have a 'backroom' for storage of backup stock. As a result he depends heavily upon his resources for fill-ins. The self-serve philosophy of the mass merchants places a great deal of importance upon packaging, p.o.p., and value-pricing versus clerk recommendations.

"Successful buying at the mass merchant level hinges on a narrow selection of proved, branded products on a price-off basis backed heavily with local promotion and rapid refill plus end-of-season resource buy back. Basically the buying motto for the mass merchant is 'Thick on the best and the hell with the rest!'

"The only major departure from the above operating format and success formula by the mass merchants is their attempt to substitute 'store brands' (like K-GRO) for national brands. This of course puts them in the contract packaging and distribution business as well as mass

continued...

retailing. Further, our field studies indicate that it has dampened the price-off leadership position by having fewer national brands to 'football.'

"In contrast to the mass merchant, the hardware retailer, whether he has a home center, lumber yard, or traditional hardware store, has a differing set of demands and expectations of his lawn and garden resources.

"Basically, the hardware retailer looks for a broader selection of lawn and garden merchandise, some of which he will stock on a year-round basis. Nationally branded, pre-sold products are desired but not essential since there are departmental sales persons to assist customers.

"Typically the hardware retailer will seek full markups on the lawn and garden merchandise with an occasional promotional item. He expects the resources to provide sales training and technical how-to information for store personnel and customers.

"Hardware retailers are 'conditioned' to buying in case lots, pallets, or truck loads of merchandise to obtain a lower landed cost. Stockrooms are frequently used for backup stocks, and in-store order writing is expected or appreciated. Once the hardware dealer buys an item, he feels it is his and he is responsible for selling or disposing of it unless it is faulty or damaged.

"Lawn and garden centers and nurseries place the greatest demands for assortments and service on their suppliers. As the specialty retailers in this industry, they strive to present a wide range of products, brands, and pack sizes.

"Like the mass merchants they do not have adequate on-site storage for backup inventories. Thus, they rely upon frequent in-season sales calls and deliveries to keep them in stock. Typically, they will price using full margins and rely upon clerk service to complete the sale.

"Lawn and garden centers are viewed as the lawn and plant care specialists who are the problem solvers when it comes to gardening problems. As a result of their technical advisory services, they effectively can sell unknown, private label, or generic merchandise as well as nationally branded goods.

"These businesses operate with a skeleton offering on a year-around basis and therefore require 10-12 month servicing. They tend to be rather unsophisticated retailers when it comes to in-store merchandising and advertising. In-store services from sources is a very important requirement of these dealers."

Vendor's perspective

"Lawn and garden vendors ideally would like to sell and service a major share of the highly fragmented retail market throughout the nation with a single product line, one standard promotional package, and a uniform distribution program.

"This would greatly simplify the task for the vendor. However, it is not compatible with market and operating realities that exist in the lawn and garden industry."

"Vendors who select a one-step distribution strategy for the lawn and garden industry find themselves faced with a series of trade-offs. For example, direct sales to national chains and mass merchants can and are being made on a one-step basis. However, even in these cases many of the mass merchants are demanding regional factory support for their programs."

"One-step distribution as an exclusive strategy for the lawn and garden market limits the vendor to concentrating on the chains and mass merchandisers who are willing to perform their own distribution and marketing functions with internal company resources.

"The economics of a one step distribution program break down when vendors reach out to serve the balance of the lawn and garden market which is dominated by independent retailers in the hardware and garden center sectors plus a scattering of retailers in numerous other retail industries.

"The sheer size of the territory to be covered, number of individual sales calls with a limited line or single item, the credit and collection costs, the physical warehousing of steady production for a highly seasonal market, high cost of order processing and picking small lots, impact of minimum freight rates, and less than truck load tariffs, delays and unpredictable delivery schedules plus the almost impossible task of in-season servicing the individual independent retail account rules out one-step distribution as a viable option for marketing to some 37,000 lawn and garden and hardware retailers who accounted for $13.1 billion in 1982 sales, which represent approximately 75 percent of the total lawn and garden market."

Value added by distributors

"The lawn and garden market with its highly fragmented market dominated by independent retailers, the dramatic variations in regional and individual sales territory demand patterns, the marked seasonality, weather and pest impact on demand, the problem solving instant delivery requirements, the widely fluctuating price/volume/weight/turnover characteristics of the products and the element of product perishability make it a classic example of the validity of the basic marketing and distribution functions.

"It is a marketing and distribution principle (or law) that certain basic functions must be performed within the channel of distribution if a product is to flow from the vendor to the ultimate consumer. The functions must be performed by one level of the channel of distribution (i.e. vendor, distributor, or retailer) or a combination of the levels. Further, the basic marketing and distribution functions can be shifted either up or down the channel of distribution but they *must* be performed at one or another point in the channel of distribution.

"Typically, economic, competitive, and operating pressures within a given industry like lawn and garden will shift the performance of the various functions to the level or combination of levels which results in the optimum cost-

continued on page 52

ADVERTISEMENT

PRODUCT MOVEMENT

The data from retailers showed that some did surprisingly well in 1982 in view of the general economy, while others had serious setbacks in the season just completed. In sum, the lawn and garden data reflects a combination of weather factors and a depressed economy in 1982. We measured nine product lines sold through four key classes of retailers to obtain trends, but not to measure total retail sales volume.

By Wendall J. Burns.

9 product lines measured

		Total	Northeast	N. Central	South	West
Walk-behind Mowers	Up	20.9%	16.3%	18.3%	26.8%	19.1%
	Same	38.5	36.7	35.4	43.9	33.3
	Down	25.6	28.6	28.0	20.7	28.6
Riding Mowers /Lawn Tractors	Up	21.6	24.9	23.9	18.0	12.5
	Same	36.0	31.3	45.7	35.9	....
	Down	32.8	21.9	26.1	41.0	75.0
Spin Trimmers	Up	28.2	24.6	25.6	30.5	38.0
	Same	37.2	36.7	36.6	42.7	19.1
	Down	17.5	16.3	18.3	18.3	14.3
Replacement Parts	Up	70.4	78.1	60.9	74.4	75.0
	Same	28.0	18.8	39.1	23.0	25.0
	Down	.8	.....	.....	2.6	.....
Chemicals (all types)*	Up	28.4	52.9	22.2	32.6	.....
	Same	37.6	29.4	41.7	32.6	53.8
	Down	12.8	11.7	16.7	9.2	15.4
Herbicides*	Up	33.9	29.6	33.3	38.9	31.3
	Same	44.9	51.9	43.6	41.7	43.7
	Down	18.6	14.8	23.1	16.6	18.9
Insecticides*	Up	50.9	51.9	53.9	55.6	31.3
	Same	28.0	25.9	30.7	25.0	31.3
	Down	20.3	22.2	15.4	19.4	31.3
Watering Equipment	Up	19.4	27.3	16.0	16.5	24.1
	Same	36.1	34.0	37.3	39.2	27.7
	Down	30.0	27.3	30.7	29.1	34.4
Garden Tools	Up	15.3	18.5	5.2	19.5	25.2
	Same	43.1	33.4	53.8	36.1	50.0
	Down	34.8	44.4	35.9	33.3	18.9

Source: 1982 Summer LGM Product Movement Report

**The mass merchandisers' and hardware/home centers' questionnaire asked for information on horticultural chemicals. The questionnaire to garden centers broke down horticultural chemicals into herbicides and insecticides.*

■An overall flat sales curve for the 1982 summer selling season is the picture given by retailers responding to the quarterly Product Movement Report conducted by **Lawn & Garden Marketing.** The healthy increases in sales of some product categories were countered by moderate to steep decreases in other lines.

For example, while the sales of lawn mowers dropped off, as was anticipated, the market for replacement parts through the servicing dealers was in a boom stage. In the power equipment category, the specialty retailers—the independents—apparently maintained sales levels compared to previous years better than did the multi-department volume retailers responding to the survey. The same trend was indicated by respondents who reported on the sales of horticultural chemicals: The independents, as a rule had fewer declines, and a higher percentage of increases in volume in many basic lawn and garden categories than did the volume retailers.

In the category of walk-behind mowers, the South fared better than did any of the other geographic regions, with 27 percent of the retailers stating that volume increased, 44 percent reporting about the same volume as in 1981, and 21 percent reporting decreased sales volume. The West showed the most decline in sales, with 29 percent showing decreases, with a drop of 25 percent or more for 14 percent of those reporting.

Summing up data for all regions, 39 percent of the respondents reported walk-behind mower sales were about the same as in 1981. The fact that 26 percent of the respondents reported decreased volume, and only 21 percent reported increases, gave the overall sales picture a downward tilt.

Spin trimmers continue gain

The sales of spin trimmers continue on an upward sales curve,

REPORT summer, 1982

End-of-season inventory – mowers

The retailers of walk-behind mowers wrapped up the 1982 summer season with some inventory still on the sales floors. The median number of units, per store, was 13 – half of the retailers had more than that, per store, and half had less than 13.

Many of the mass merchandisers, with a goal of zero inventory at the end of the peak selling season, achieved that goal: 17 percent did report zero inventory, and eight percent reported eight units per retail outlet.

However, retailers with goals of providing a better in-stock position for customers with late-mowing and fall clean-up tasks – the hardware stores, home centers, and power equipment specialists (OPE) – had more units in stock at summer's end. The OPE dealers had a median of 19 units per retail outlet.

The median number of units held per store did not vary greatly from one region to another. In the North Central States, 15 units per store was the median inventory at season's end, the highest of all the regions. In the South, sell-through by dealers was the most complete.

Retailer inventory by geographical regions

	All Regions Total	North-east	North Central	South	West
Handle mowers	**85.0%**	**81.6%**	**81.8%**	**91.5%**	**81.0%**
Units in inventory					
None	9.8	8.2	8.5	12.2	9.5
Less than 5	12.4	10.2	9.8	18.3	4.8
5-14	23.9	24.4	22.1	25.6	23.8
15-24	12.4	14.3	14.6	11.0	4.8
25-49	15.8	10.2	17.1	15.9	23.8
50-99	7.3	6.1	8.5	6.1	9.5
100 or more	3.4	8.2	1.2	2.4	4.8
Median =	13.4	13.8	15.3	11.2	12.5

Mower inventory by retailer category

	(Percent of retailers responding)			
	Total	MM	HH	PE
Handle mowers	**85.0%**	**76.9%**	**77.2%**	**92.0%**
Units in inventory				
None	9.8	17.3	7.0	8.0
Less than 5	12.4	7.7	17.6	12.0
5-14	23.9	23.0	33.3	20.0
15-24	12.4	11.5	7.0	15.2
25-49	15.8	9.6	5.3	23.2
50-99	7.3	3.9	7.0	8.8
100 or more	3.4	3.9	......	4.8
Median =	13.4	10.9	8.1	19.2

Source: 1982 Summer **LGM** Product Movement Report

with two of three retailers reporting volume as the same or more in 1982. Twenty-eight percent said volume increased compared to 18 percent who said it decreased. This product category made the best showing in the West, with 38 percent of the retailers there claiming increased volume and only 14 percent showing a decrease.

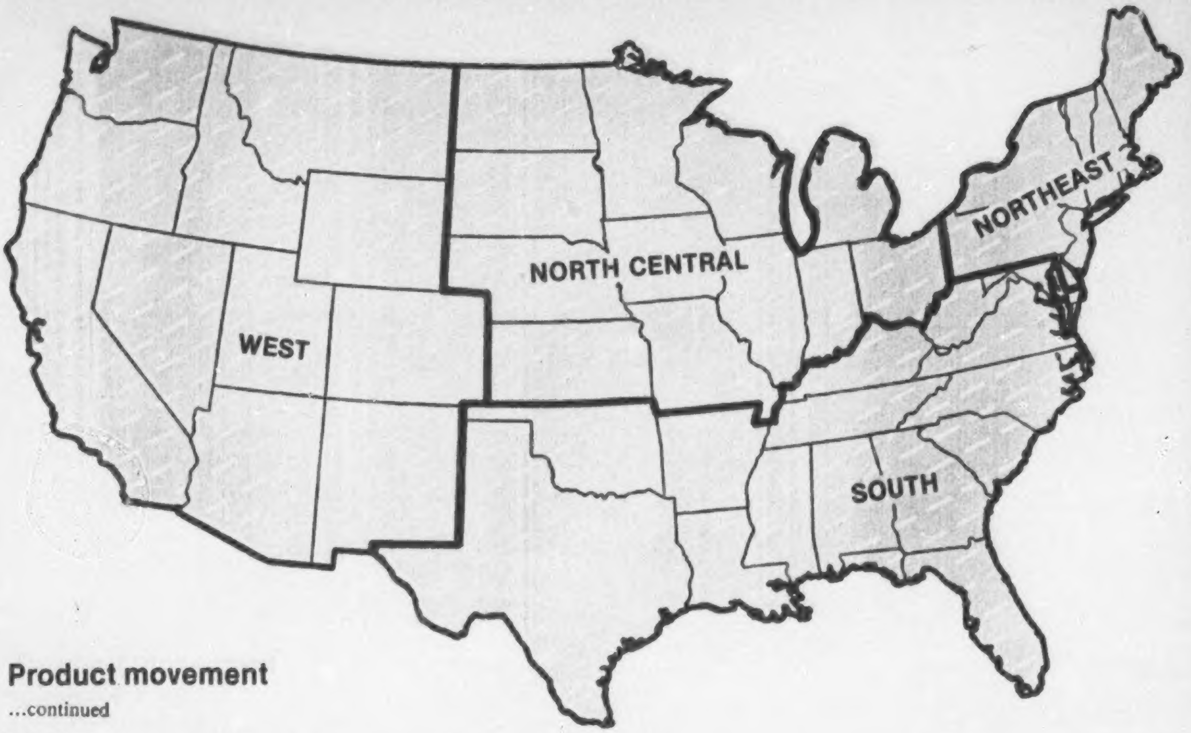
Reports from the South, North Central and Northeast showed more retailers had increased sales of spin trimmers than had decreased volume, but none of the regions reported heavy volume increases.

Replacement parts boom

The bright side of the power equipment business continues to be in replacement parts. Seventy percent reported sales volume up with 30 percent of them reporting sales up 25 percent or more. Reports of replacement parts being down were practically nil. The Northeast, with 78 percent reporting parts-sales increases, led the other regions. The North Central states, with 39 percent of the respondents stating that sales were about the same, had a flat sales curve in parts sales compared to other markets. But, even in those states, 61 percent reported increased volume.

Only in the Northeast did the sales volume of riding mowers/lawn tractors hold its own, with the number of dealers showing an increase exceeding the numbers who had decreased volume of these units. Summing up data on movement of riders/lawn tractors for the four regions, 36 percent showed about the same volume in 1982 as in 1981, 22 percent showed more volume and 33 percent showed decreased volume. Thirteen percent of

continued...



Product movement

...continued

them said volume was down 50 percent or more.

Chemicals gain in all regions

Chemicals for horticultural uses, and for pest control around the home gained in all regions of the country, and through all categories of retailers handling the products.

Data from the Product Movement Report shows also that the individual specialty retailers—garden centers—(retail nurseries)—showed greater percentages of increases, than did the hardware/home centers, multi-department stores and other volume retailers.

Products with exceptionally good sales

In addition to products listed in the questionnaire, retailers were asked to report *other* merchandise producing exceptionally good sales volume during the sales season. The great majority of those responding to this question answered "none." The products receiving the most frequent mentions as producing good sales were plant materials, Ortho Kleenup, Snapper Thatcherizers, Lawn-Boy Mowers, and Kero-Sun heaters.

In one region of the country, the Northeast, the number of volume retailers showing gains in horticultural chemicals surpassed the number of independents with increased volume. In that geographical region, 53 percent of the volume retailer respondents showed volume was up, with 23 percent reporting increases above 25 percent over 1981 sales of chemicals.

Herbicides and insecticides

The chemical survey designed for the specialty retailers—the garden centers—asked for separate data on herbicides and on insecticides. The latter showed greater gains than did the herbicides, with 79 percent showing equal or increased volume compared to 1981, with only 53 percent of the respondents showing that herbicides either gained or remained the same. Fifty one percent of the respondents said insecticides sales were up, with the South leading, with 57 percent saying volume of insecticide sales were up. For all of the garden center respondents, the median increase was 9.3 percent.

Watering Equipment

Sales volume of watering equipment was down in all regions of the country, except the Northeast where it was apparently about level with 1981. (Within the various regions, there were, of course, exceptions. For example in the Northwest, which is within the census region that in this report we define as the West, there were reports of good sales volume.) But, volume apparently took sharp drops in the North Central, South, and in the West.

Overall, thirty percent reported watering equipment sales down, with 17 percent of the respondents reporting sales down 15 percent or more from 1981 levels.

Garden Tools

Retail sales volume of garden tools was down in all regions of the country, except the West, compared to 1981 volume. Overall, 35 percent of the respondents said their sales were down, 43 percent said volume was about the same, and only 15 percent said they had increased sales volume in the 1982 season.

In the West, there was a slightly favorable trend for the tools, with 25 percent showing increases, 50 percent "about the same" and, 20 percent showing decreased volume. □

Vegetable gardeners still 38 million strong

CPI
July
1982
299.4

Food gardening in the U.S. apparently peaked in 1981 and has leveled off. Approximately the same number as last year—38 million households—are continuing to cultivate vegetable gardens in 1982, although the percentage of gardening households is down. Forty six percent of the U.S. households are growing vegetables in 1982 compared with 47 percent in 1981; but there are an estimated 1.7 million more households these days versus a year ago. According to the annual population testing of the U.S. Dept. of Commerce, Bureau of Census, there now are an estimated 82.4 million households. In addition to traditional gardeners six million households (7.3 percent) grow vegetables in containers, window boxes and border plantings. Twenty two percent (over 18 million) are caring for fruit trees and seven percent of the households—again, about six million—grow pecans, walnuts and other trees of this type.

Lawn and garden activities 1981-1982
(Percent of households)

	1981 %	1982 %
Lawn care	65	63
Vegetable Gardening	47	46
Indoor Houseplants	51	48
Flower Gardening	47	50
Shrub Care	43	42
Fruit/Berry Growing	30	35
Nut Tree Growing	05	07
Home Greenhouse	02	03

Source: Gardens for All/Gallup Organization Survey

Where the food gardens are growing
(Percent of households)

	1980 %	1981 %	1982 %
Midwest	54	55	58
West	28	41	44
East	41	42	41
South	42	49	39

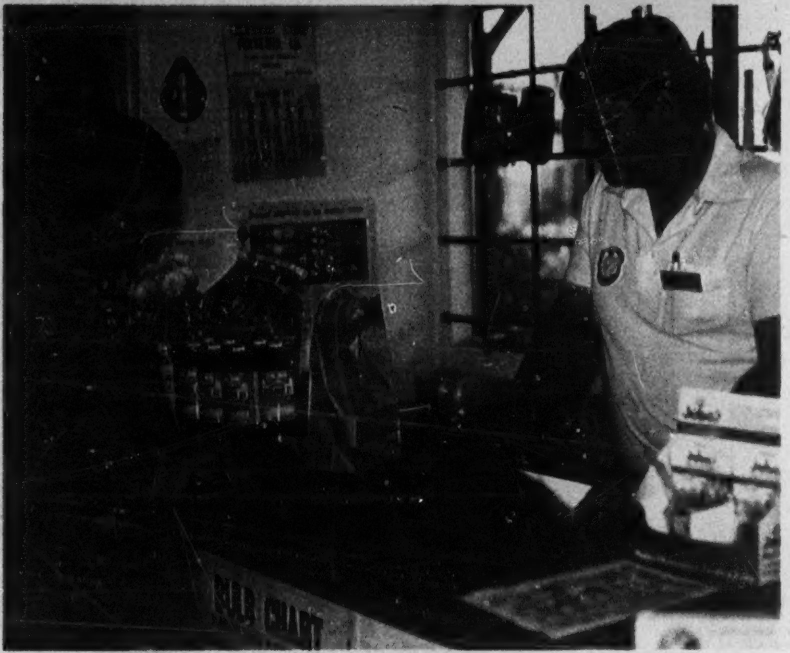
Source: Gardens for All/Gallup Organization Survey

It all adds up to the fact that a majority of American families and singles who maintain their own dwellings are producing some of their own food. This, despite 1982's market surplus of vegetables. They may be spurred by the Consumer Price Index into being somewhat

continued...

CPI
1967
100

LARGEST SELECTION OF
VEGETABLE
SEEDS
IN SOUTHERN CALIFORNIA



self-reliant. These gardeners are combating a CPI that has *slowed* for all commodities but still continues its inexorable upward creep.

These are some of the earliest-available figures from the annual, nationwide survey sponsored by Gardens for All, the non-profit National Assn. for Gardening, Burlington, Vt., and conducted by the Gallup Organization, Princeton, N.J. At press time, some survey results still were being tabulated.

Through the years, respondents to the survey questions have indicated that helpful, reliable gardening information is the key to good, successful gardening.

"Our experience of coordinating the National Gardening Survey has confirmed that the use of solid, helpful information produces long term satisfied gardeners," said Jack Robinson, president of Gardens for All.

Gardeners get their information from a wide range of resources. The five top sources for gardening information are: seed packets, used by 33 million gardening households; friends and neighbors, used by 18 million; magazines, used by 17 million; relatives, used by 16 million and newspapers, used by 15 million gardening households. These figures are from an earlier survey and are typical of answers received. ☐

When all the survey results have been tabulated, the 1982-83 Gardens for All/Gallup-National Garden Survey will be coordinated into 300 pages of highly usable data about U.S.A. household gardening propensities. The total survey is available to marketing groups and similar, interested organizations. For information, contact Dept. P157, Gardens for All, 180 Flynn Ave., Burlington, VT 05401.

benefit ratio or the maximum value added to the product.

"For example, the most expensive place to store and finance inventories is at the retail level. Thus, you find the bulk of the lawn and garden industry's inventory being stored and financed at the vendor and/or distributor level. Actually the lowest cost (highest cost-benefit) place for lawn and garden inventory storage and financing would be at the vendor (manufacturer) level.

"However, this is not operationally feasible nor does it result in the optimum cost-benefit or value added because of the need for steady production and stockpiling required to meet the seasonal demand that requires instant in-season servicing. One central stockpile of lawn and garden products would keep the factories and processing plants running, but it would not solve the problem of the quick distribution response time which is required to serve most of the market. The result is a decision on the part of many lawn and garden vendors to spread the production output around the nation in distributors' warehouses which are closer to the retailers and consumers.

"Thus the physical storage of lawn and garden products is shifted to the distributor level in the channel of distribution, and in turn the distributor receives dating which means the vendor is still providing the financing function.

"Let us now turn our attention to the functions that progressive lawn and garden distributors perform in the channel of distribution, which result in value added to the vendor's product:

- Regional pricing strategies
- Product development input
- Promotional programming
- Market research
- Credit and collections
- Field sales training
- In-store servicing and merchandising
- Order processing
- Quick delivery
- Market coverage
- New product introductions
- Breaking bulk
- New account development
- Dealer development programs
- Instant response to local specific needs

"Any or all of these functions which are typically performed by the distributor could be shifted back to the vendor and performed by his organization. However, as pointed out earlier, the structure of the lawn and garden market and the operating realities of the industry in most cases suggest that the optimum cost-benefit and value added result when the functions are shifted to the distributor level.

"This is best described by using classic distribution to emphasize the value added by distributors in a highly fragmented market. For example, take a case in which the vendor has selected a one-step distribution strategy to serve the diverse lawn and garden market.

"The vendor would, in addition to his production and packaging functions, have to take on all the distribution functions listed above on a direct one-on-one basis from a central point with up to 46,000 retail outlets.

"This would mean individual sales calls, orders, credit reviews, order picking, packing and shipping, collections, promotion planning, in-store training and merchandising, in-season servicing, etc.

"Not only would there be tremendous duplication of marketing and distribution efforts by the various vendors each calling on and servicing the individual retail outlets, but there would be unacceptable delays in delivery, prohibitive delivery costs, tremendous field sales expense, dramatic increase in storage costs, massive increases in order processing overhead, and lack of total market coverage.

"The lawn and garden distributor who is aggressively covering the majority of the various forms of retailers in his territory who carry lawn and garden products can simplify the marketing and distribution process for the vendors by performing the value adding services listed earlier for several vendors.

"The distributor, by being close to his local market, can better perform on a cost and operationally effective basis many of the marketing and distribution functions. He is in a better position to evaluate and monitor a local retailer's credit worthiness. He can afford frequent sales calls, quick order processing, and timely deliveries because he is representing several vendors and not just a single line or item. There are some real operating economies that the well run distributor can provide because of the economies of scale which he brings to the distribution process. Further, his physical proximity to the local market enables him to provide the very important immediate response to the lawn and garden retailers' in-season needs.

"The challenge facing lawn and garden distributors in the 1980's is to develop full service and representation programs for vendors by developing multiple marketing programs that assure coverage of the highly fragmented local markets they serve.

"Simply stated, this means the lawn and garden distributor must sell and service a wide range of local retailers ranging from hardware stores to military exchanges, instead of concentrating on just garden centers or mass merchandisers. If the lawn and garden distributor provides total market coverage and a full range of marketing and distribution services, he will assure his role in the industry.

"Failure to perform these services will result in the vendors seeking alternate distributors such as grocery wholesalers, hardware wholesalers, drug wholesalers, etc., and/or limited direct distribution programs.

"The basic economics and operating requirements of the seasonal and highly fragmented lawn and garden market provide the opportunity for survival and growth for the aggressive full service lawn and garden distributor. It's up to the individual lawn and garden distributor to assure his place in the lawn and garden industry because opportunity is there for the taking.

"When you get back to your businesses, re-evaluate your local market coverage and the extent of your distribution and marketing services. If you are providing or are willing to provide a full function package of distribution and marketing services coupled with saturation sales coverage in your local market, your position in the lawn and garden distribution channel is assured or maybe we should say "insured." □

NEW MARKETS:

Urban/rural lifestyles fan out from cities

By Marjorie Riggin

There was a clearly perceptible population shift away from densely peopled areas during the decade between 1970 and 1980. As reported by the U.S. Bureau of the Census, until this time the trend toward cities and their fringe areas grew steadily as it had since the early 1900s. The historic pattern was reversed in the seventies for the first time since 1820, with the population gravitating toward unincorporated, farming communities and open countryside in preference, even, to smaller cities and towns. The gain for the unincorporated areas: 15.1 percent.

To maintain geographic consistency in the presentation of data, Standard Metropolitan Statistical Areas (SMSA's) is the Census Bureau designation for any large population nucleus, together with adjacent communities which have a high degree of economic and social integration with that nucleus.

Population continued to grow during those years: from 203.2 million in 1970 to 226.5 million, 1980, but, according to census analysts, whereas the 1970 data indicate that half the U.S. populace (exclusive of Alaska and Hawaii) lived in counties with fewer than 422 persons per square mile, the 1980 dispersion shows the same proportion residing where there are 383 or fewer persons per square mile. This is interpreted as rural de-urbanization—a metropolitan AND suburban exodus. The children and grandchildren of those who flocked to the cities and their environs to make it big are doing a resolute about-face.

Coincidentally, although many of the people surveyed in the 1980 census expressed a preference for low-density living, they also desired to settle where a not-too-distant city or recreational area offers cultural advantages, fun and socializing. This fact alters the image of would-be hermits heading for the hills. All of this is reflected in the cities that did show high percentages of growth increase. Besides Olympia, Wash. and Fort Collins, Colo. SMSA's, both with recreation, mountain-style, the eight other fastest growing SMSA's, 1970-1980, were all Sun Belt cities with exceptional recreational advantages. Otherwise, cities such as New York, Chicago, Philadelphia, Cincinnati, Cleveland, Kansas City...lost population.

continued...

Percent Change in Metropolitan and Nonmetropolitan Population: 1950 to 1980

(Reflects areas as defined at end of each decade)

Area	1940-1950[1]	1950-1960	1960-1970[2]	1970-1980
United States.	14.5%	18.5%	13.3%	11.4%
Inside SMSA's . . .	22.0	26.4	16.6	10.2
Central cities[3] . .	14.0	10.7	6.4	0.1
Outside central cities[3]	35.5	48.6	26.8	18.2
Outside SMSA's . .	6.1	7.1	6.8	15.1

[1] Including Alaska and Hawaii.

[2] 1970 tabulated population excluding subsequent corrections.

[3] Data for central cities and outside central cities do not include any revisions for annexations or other boundary changes during the decade.

Source: U.S. Dept. of Commerce, Bureau of the Census

SMSA's and Central Cities in the United States: 1950 to 1980

(Reflects areas as defined at end of each decade)

Area	1950[1]	1960	1970	1980
SMSA's	169	212	243	318
With population increase since preceding census of—100 percent or more . . .	1	7	2	.....
50 to 99 percent	21	23	6	20
25 to 49 percent	47	72	45	59
10 to 24 percent	75	79	112	98
0 to 9 percent . .	19	23	55	112
With population loss	6	8	23	29
Central cities . . .	194	257	308	429

[1] Including Alaska and Hawaii.

Source: U.S. Dept. of Commerce, Bureau of the Census

The 10 Fastest Growing SMSA's: 1970 to 1980

Rank	SMSA	Percent Increase
1	Fort Myers-Cape Coral, Fla.	95.1
2	Ocala, Fla.	77.4
3	Las Vegas, Nev.	69.0
4	Sarasota, Fla.	68.0
5	Fort Collins, Colo.	65.9
6	West Palm Beach-Boca Raton, Fla.	64.2
7	Fort Lauderdale-Hollywood, Fla.	63.5
8	Olympia, Wash.	61.6
9	Bryan-College Station, Tex.	61.4
10	Reno, Nev.	59.9

Source: U.S. Dept. of Commerce, Bureau of the Census

Ten Major Cities and How They Decreased 1970-1980

	Percent Change
St. Louis	−27.2
Detroit	−20.5
Washington, D.C.	−15.7
Cincinnati	−15.0
Minneapolis/St. Paul	−13.9
Philadelphia	−13.4
Kansas City, Mo.	−11.7
Chicago	−10.8
New York	−10.4
San Francisco	−5.1

Source: U.S. Dept. of Commerce, Bureau of the Census

Urban/rural lifestyles

...continued

One of the most important factors impelling the population dispersion was job availability—the movement toward smaller communities of industries, particularly individual facilities of giant, business consolidations. Because of the economy, however, the communities and thousands of their deurbanized as well as longtime residents have been left high and dry when the glittering job-bubbles broke. Small-to-conglomerate sized employers across the country have been reeling in promises of corporate benevolence to towns and townsmen, alike. Now, suddenly jobless, the ruralized resident must decide whether to stay, or to search out employment *wherever* available.

Not all small-town employment opportunities have been cut off, just presently reduced. Nor was job-following the only incentive for leaving city lights behind. There are the retirees, but the majority of the migrants are in their most acquisitive, productive years and have been dubbed by *The Mother Earth News* as the "Open Collar Market" shifting to "New Where." Open Collar: a combination of white collar backgrounds and expectations with their blue-collared self-reliance.

Cleaner air and a slower pace also were considerations in seeking their "New Where." And many families moved in order to rear children according to the older, traditional values of back-country living, hoping to isolate them like battery-raised chicks from the delinquencies of city street crime.

Cash registers follow

What is the economic impact of this migration on the smaller communities? *The Mother Earth News* also writes that "where people go, cash registers follow." Has this led to a resurgence in rural retailing? Yes and no. Yes, because shopping malls have mushroomed near mountain passes and in unlikely meadows. The K-Mart in Bend, Ore., however, doesn't carry the same merchandise assortment as does a sister store on the fringes of Chicago. Differing life-styles influence product demand. And the impact of a K-Mart on retailers around Chicago can't be compared with the demolishing effect of the same—or a new mall—on hinterland merchants. Or, on town treasuries that suffer from lost sales tax revenue when malls are located beyond town jurisdiction.

Census analysts predict that "New Where" is here to stay, at least, until it, too, becomes urbanized. Mass merchants will continue to follow the Open Collar migration, employing econometrics to foretell profitable locations for their cash registers. With population density no longer necessary for successful selling, as much as 40 percent of retailing business will be dispersed from SMSA's during the 1980s, according to some estimates.

Already, sales of garden tillers, gas chain saws and riding mowers are skewed toward rural purchasing. In the January, 1982 issue of **LGM**, was discussed the trend toward trading up to more powerful equipment for bigger gardens: larger garden tractors and more attachments, for example.

Photo credit: JRCO Inc.

Shopping habits have changed. The reliable mail order house still serves a need but is less important. It's a rare rural resident who isn't on wheels. Traveling 50 miles to a shopping center now is a way of life. Nevertheless, certain retailers are still drawing those shoppers into town. These home town merchants will continue to prosper because they offer services or consumer education and advice unavailable in over-busy, under-staffed shopping environments. DIY home centers, outdoor power equipment dealers, and garden centers are good examples of merchandisers who have something special to offer the new rural residents with big-city incomes. ☐

Are major lawn and garden categories on a roll?

Market studies indicate a reviving "roll" in some product lines that is expected to pick up speed as the months progress. Just what is the momentum of major categories? By Marjorie Riggin

■One category that, generally, has seldom slowed is nursery stock at the wholesale level. Green goods—vegetable and flowering-foliar type bedding plants also have continued to show respectable profits in most of the 25 reporting states, as documented each year by the Crop Reporting Board, U.S. Dept. of Agriculture, in their publication *Floriculture Crops.* In 1981, vegetable bedding plants accrued a tidy $7.8 million more dollars for those states compared with 1980—a 16 percent increase in the value of sales at wholesale vs. 12 percent more in 1980, compared with 1979. Only three states: Maryland, Ohio and Tennessee reported lower values of sales at wholesale for their vegetable bedding flats; the wholesale price of bedding continued to advance in 1981; and the value of sales at wholesale also advanced, although at a slower pace than in 1980: 15 percent compared with a 22 percent rate of increase in 1980 over 1979, for all 25 reporting states.

As reported in March, 1982, **LGM,** a survey among members of Bedding Plants Inc. showed a slight "softness at the wholesale level" even though 92 percent of the respondents reported sales that were the "same or better in 1981, compared with 1980."

Florida's foliage shows solid gain. Surprisingly, Florida was one of

continued...

Bedding plants—vegetable types 1/

State	Producers		Production Area		Flats sold		Value of sales at wholesale 2/	
	1980	1981	Intended 1982	1982 As % of 1981	1980	1981	1980	1981
	Number		1,000 sq. ft.	Percent	1,000 Flats		1,000 Dollars	
CALIF 152,000	39	41	2,352	107	1,280	1,210	5,939	6,086
COLO	62	54	226	103	125	138	505	956
CONN 3/	84	88	687	101	320	347	1,302	1,832
FLA	19	18	487	101	852	717	2,139	1,764
GA 3/	56	56	640	115	339	294	1,403	1,467
ILL 3/	121	129	637	104	339	328	1,390	1,640
IND	114	132	500	101	228	283	1,026	1,302
IOWA 3/	118	118	434	105	221	238	1,549	1,587
KANS 3/	50	43	218	101	100	130	569	868
MD	38	32	224	100	152	140	649	609
MASS	167	163	588	99	412	314	1,920	1,614
MICH 3/	280	280	2,700	104	1,533	1,586	5,703	6,185
MINN 3/	160	164	854	104	326	353	1,813	2,051
MO 3/	76	83	493	98	272	299	1,346	1,767
N J	114	106	632	100	342	338	1,621	1,501
N Y	295	326	1,515	99	699	806	3,334	3,949
N C	90	101	853	109	389	441	1,735	2,298
OHIO 3/	325	303	2,749	98	1,375	1,456	5,789	6,523
OREG 3/	48	52	381	101	164	179	1,045	1,094
PA 3/	201	231	1,231	106	581	662	1,917	2,350
TENN	49	60	463	103	214	282	922	1,266
TEX 3/	80	82	1,087	109	594	981	3,285	5,180
VA	45	44	381	104	243	225	1,125	1,175
WASH	34	46	360	101	132	166	784	1,051
WIS	86	98	450	101	197	258	959	1,419
Total	**2,751**	**2,850**	**21,142**	**103**	**11,429**	**12,171**	**46,769**	**57,534**

1/ Does not include "open acreage" of vegetable transplants grown outdoors for use in commercial vegetable production.
2/ Equivalent wholesale value of all sales. 3/ 1980 Revised.
Source: Crop Reporting Board, USDA

Bedding plants—flowering and foliar types

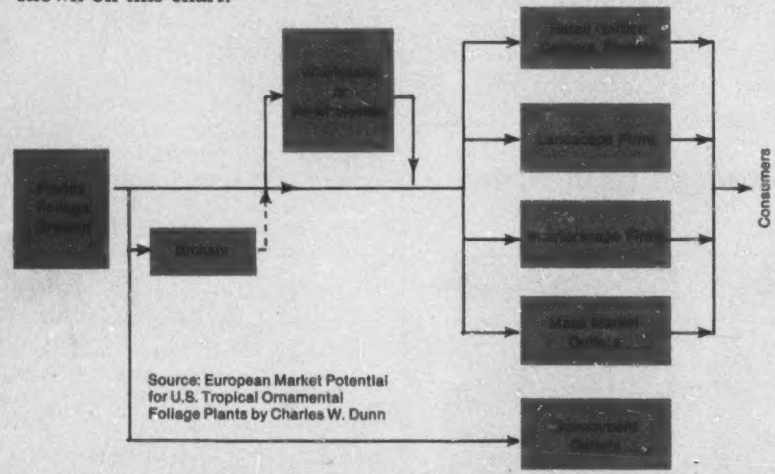
State	Producers		Production Area		Flats sold		Value of sales at wholesale 2/	
	1980	1981	Intended 1982	1982 As % of 1981	1980	1981	1980	1981
	Number		1,000 sq. ft.	Percent	1,000 Flats		1,000 Dollars	
CALIF	63	69	9.766	118	4.498	5,251	26,628	27,935
COLO	68	57	1,126	95	575	571	2,766	3,563
CONN 2/	85	90	1,036	102	533	574	2,180	3,025
FLA 2/	37	35	1,701	114	1,302	1,388	5,247	6,537
GA 2/	59	58	1,098	114	430	498	1,793	2,077
ILL 2/	133	139	1,668	103	868	914	3,871	4,981
IND	119	134	947	102	417	528	1,831	2,434
IOWA 2/	117	117	773	104	375	424	2,614	2,870
KANS 2/	53	47	697	102	266	359	1,894	2,552
MD	45	41	719	107	456	450	2,079	1,908
MASS	179	173	1,396	100	749	748	3,041	3,912
MICH 2/3	320	310	7,699	101	4,572	4,842	17,648	20,385
MINN 2	171	174	2,026	104	785	873	4,239	5,046
MO	75	80	976	99	533	608	2,590	3,259
N J	134	114	1,607	100	796	871	3,797	4,059
N Y	316	345	2,804	101	1,544	1,573	7,674	8,400
N C	94	112	1,829	110	618	880	2,861	4,215
OHIO 2/	337	325	6,063	101	3,300	3,259	13,563	15,252
OREG 2/	56	53	870	102	421	566	2,774	3,498
PA 2/	252	285	3,076	105	1,245	1,646	5,217	6,403
TENN	57	59	546	105	410	328	1,734	1,519
TEX 2/	83	90	1,648	103	1,061	1,351	6,461	7,106
VA	52	46	757	104	465	487	2,199	2,493
WASH	42	53	934	98	521	495	2,980	3,366
WIS	90	100	1,154	100	581	636	2,844	3,593
Total	**3,037**	**3,106**	**52,916**	**105**	**27,301**	**30,120**	**130,525**	**150,388**

1/ Equivalent wholesale value of all sales. 2/ 1980 Revised. 3/ Does not include "open acreage" grown outdoors.
Source: Crop Reporting Board, USDA

Major categories ...continued

the states reporting a negative wholesale sales value for flowering and foliar bedding plants. It's a different story where Florida's foliage plants, larger and for indoor decor, are concerned. Their latest report at this writing shows that—in **numbers** of sales compared with last year, same time— all varieties including hanging plants and totems, show a 22 percent gain. Even in the face of high wages and other spiraling costs, this may be enough margin to prevent financial difficulty for some growers whose buyers in the U.S. and Europe are experiencing common economic problems. On both sides of the Atlantic, plants are most popular that impose lowest energy requirements to reach maturation in the shortest possible time.

Florida foliage plants move through multiple market outlets as shown on this chart:



Source: European Market Potential for U.S. Tropical Ornamental Foliage Plants by Charles W. Dunn

Over one-third of Florida foliage growers' sales are made to retail garden centers and florists, about 31 percent to wholesale greenhouses and florists and 10 percent to mass market outlets. Fifteen percent is sold through brokers, eight percent to other Florida growers and just one percent to interiorscape and landscape firms.

Fifty nine million households—76 percent of more than 77 million enumerated U.S. households—were reported in the April-May, 1982 issue of **LGM** as maintaining one or more indoor plants in 1981. In this same issue, **LGM** also reported that as many as eight plastic planters per household are containing these plants, with clay planters running a close second in popularity; and ceramic planters, third.

MANUFACTURERS SHIPMENTS OF SUMMER & CASUAL FURNITURE (Millions of $'s)

	1981 SCFMA Estimate	1980 Census & SCFMA Estimate	1977 Census of Manufacturers
Total Industry	$693.3	$597.7	$483.1
Total Metal (Porch, Lawn & Outdoor)	404.6	348.8	275.9
Aluminum	222.5	191.8	151.7
Wrought Iron	88.3	76.1	60.2
Other Metal	54.8	47.3	37.4
Metal (not specified by kind)	39.0	33.6	26.6
Total Wood (Porch, Lawn & Beach)	108.0	93.1	77.5
Reed & Rattan	59.0	50.9	42.4
Total of Above	571.8	492.8	395.8
FiberGlass & Molded Plastic	121.7	104.9	87.3

Source: National Assn. of Furniture Manufacturers Inc. U.S. Dept. of Commerce, Bureau of Census

Metal furniture leads

As estimated by the Summer and Casual Furniture Manufacturers' Assn., summer and casual furniture shipments continued to roll along in 1981 in contrast to difficulties in other parts of the furniture industry. Whereas the market for outdoor furniture appeared undeterred—even stimulated—sales of more typical furniture suffered from weaknesses in residential construction as well as from the economy's abrupt braking of an upwardly mobile population.

The largest category in outdoor furniture in 1981 remained the metal category, with shipments of over $400 million, 71 percent of a total casual furniture business of just under $700 million (at manufacturers' invoice). Fiber glass and molded plastic furniture figures are included in this total.

These SCFMA estimates represent a 43 percent increase over the total industry figures reported in the 1977 Census of Manufacturers. Shipments of all types of metal furniture for porches, lawns and other outdoor use have kept pace: 46 percent more metal furniture was estimated as being shipped in 1981. All the other categories maintained a steady 39 percent improvement over the 1977 figures.

BBQ: backyard-to-bank

No figure is more indicative of the steadfast boom in outdoor cooking grills than the fact that—for the first time since gas-grill shipments have been recorded by the Gas Appliance Manufacturers Assn. (GAMA), *gas grill* shipments in 1981 were greater than shipments of *residential gas ranges:* 31,000 more, according to GAMA figures. This does not mean that outdoor cooking has supplanted kitchen-prepared meals; fewer housing starts and more backyard "vacations" helped bring about this phenomenon.

Residential gas range unit shipment
1,495,700

Gas grills
1,526,700

Figures from the Barbecue Industry Assn. show that combined charcoal, gas and electric grill shipments of 12,075,616 units in 1981 had a market value of

Patio industry sales

(Retail Value—In Millions of Dollars)

	1982	1983	1985
Food & Grocery Items	3,900	4,200	4,800
Charcoal Briquets	312	345	418
Barbecue Grills	407	436	497
Lighter Products	88	107	143
Tools & Equipment	25	27	31
Miscellaneous	3.3	4.0	4.6
Total	$4,735	$5,119	$5,893

Source: Barbecue Industry Assn.

continued on page 72

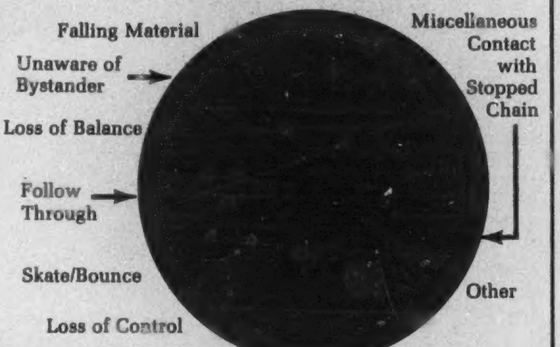
BEST AVAILABLE COPY

Power Equipment Highlights

Vol. 3 No. 8 October 29, 1982

Will chain saw safety sharpen competition?

Chain saw accident scenarios*



One manufacturer, McCulloch, claims that all injuries represented in the shaded areas of the chart could be prevented by chain brakes.

*Estimated from NEISS Emergency Room Based Special Study, November 1977-January 1978, HIEA. Source: U.S. Consumer Product Safety Commission/HIEA.

The strategy of soft-pedaling safety in outdoor power equipment may be a thing of the past, at least in selling chain saws to the consumer segment of the market.

For one thing, the Consumer Product Safety Commission, with a victory under its belt in the implementation of the mandatory safety standard for walk-behind mowers in 1982, is directing its attention more carefully to other products.

"Chain saws are on the priority list again this year...because the problems with chain saws have not been resolved," the chairman of the CPSC, Nancy Steorts, told a seminar of retailers and wholesalers during the National Hardware Show in Chicago. The seminar was co-sponsored by the Chain Saw Manufacturers Assn. and the OPEI.

Steorts said that since no voluntary standard has been achieved despite six years of effort, "It is hoped that priority status will help to focus attention on this product and allow both the industry and the commission to move quickly to a solution.

"The primary concern is that of kickback, as I am sure all of us know....Although some of you may disagree with the commission's analysis of its data, I think we would all agree that kickback is an extremely serious hazard."

The CPSC spokesman said that between 1976 and 1980 the number of injuries involving chain saws increased sharply, reaching a level of 123,000 persons during 1981 who required medical attention from injuries associated with chain saws. She said that based on 1978 data 23 percent of reported injuries were believed to be associated with kickback.

The CPSC budgeted $1 million for fiscal year 1983 to continue work on the standard, which the industry believes will be a voluntary standard rather than a mandatory standard.

Controlling kickback angle: CPSC's choice?

Donald Purcell, president of the Chain Saw Manufacturers' Assn., said that the staff and commissioners of the CPSC are pleased with the progress of work done by the ANSI committee on chain saws. He explained that ANSI (American National Standards Institute) considered various options: kickback angle, energy level, safety tip, chain brake, and a device to prevent operator contact with the moving chain. He said that although the ANSI committee is being careful not to disparage any of the other approaches to reduce injuries, that control of the kickback angle is apparently being favored by the CPSC at this time. The CPSC will probably not develop a mandatory standard if it accepts the proposals of ANSI, he said. The CPSC was scheduled to consider the ANSI proposal on Oct. 27.

"Our concern," Steorts said in the Hardware Show talk, "is that the homeowner be made aware of safety features when considering the purchase of a chain saw, and of the new, safer chains when looking for a replacement chain."

Meanwhile, some manufacturers at the Hardware Show were promoting their own concepts for safer sawing, and were trying to acquaint Steorts, the retailers and distributors with these concepts during their visits to the exhibitors' booths at the show. Despite assumptions in the trade in previous years that "you can't sell safety," these manufacturers believe their safety devices may give them a new competitive edge.

CPSC to begin visits to mower manufacturers

Investigators of the U.S. Consumer Product Safety Commission have scheduled visits to be conducted this fall to manufacturers of walk-behind rotary mowers to verify compliance with the new safety standard.

A spokesman in the Washington office of CPSC said that some samples of mowers actually will be tested, but that the investigation will not include the testing of mowers from each of the manufacturers. Any indication that the mowers of a given manufacturer do not comply with the 3-second blade stop, or other demands of the new standard will prompt the commission to test the mowers, he said.

In the initial visits, the inspectors to the manufacturing plants will study manufacturer records, certification labels and details of their programs for testing the mowers. The CPSC has a force of 85 inspectors to cover all industries.

BEST AVAILABLE COPY

Measuring lawn care services

Contract application of fertilizers and chemicals by large, specialty lawn care firms has been a big factor in the marketplace in recent years. This analysis of these firms' operations was based on a 1982 survey.

By Marjorie Riggin, Associate Editor.

LAWN CARE SERVICE OPERATIONS
Chemical Control Products

Granular, liquid fertilizer compared

Percentage of fertilizer expenditures (per company)	Percent
Liquid fertilizer	69.4
Less than 50%	11.6
50% to 74%	12.9
75% to 99%	29.9
100%	13.6
Not given	1.4
Median – Users	84.3%
Median – Total	52.4%
Granular fertilizer	85.0
Less than 25%	25.2
25% to 49%	12.2
50% to 74%	9.5
75% to 99%	7.5
100%	29.9
Not given	.7
Median – Users	62.5%
Median – Total	47.6%

LAWN CARE SERVICE OPERATIONS
Chemical Control Products

Annual fertilizer expenditures (per company)

	Percent
Less than $5,000	8.8
$5,000 to $9,999	19.1
$10,000 to $24,999	29.3
$25,000 to $49,999	21.1
$50,000 to $99,999	9.5
$100,000 or more	10.2
Not given	2.0
Median	$20,800

■Ask the man on the street which type of fertilizer—liquid or granular—predominates in usage by commercial lawn service operators. Because liquid-fertilizer tank trucks are conspicuous in residential neighborhoods, he is apt to answer, "Liquid." Not so. According to replies to the *Grounds Maintenance* survey of lawn care services (retailers for whom lawn care is a sideline were not included), granular fertilizer accounts in 1981 for 85 percent of their fertilizer expenditure. Sixty nine percent of the money spent for fertilizer goes for the liquid variety. There is some overlapping because several of the services use both types in meeting demands of the $800 million chemical lawn care business.

Replies to the survey questions were given mainly by presidents of the firms (46 percent) or, in 26 percent of the cases, by the owners. Their experience in the chemical lawn service business averages 7.1 years. Coincidentally, 46 percent of the answering firms have branch offices but in 39 percent of the firms, brand selections of chemical control products are made by the home office. Only four percent of the firms indicate that selections of these products are made by the branches. Fertilizers are included in this category.

All services offer fertilizing

Of those responding to the survey, the highest number—29 percent—spend from $10,000 to $25,000 annually for fertilizer whereas 10 percent spend more than $100,000 per year. Median amount spent per firm for chemical control products that include insecticides and herbicides as well as fertilizers: $39,000 during 1981. Fertilizing is just one of nine services offered by the commercial lawn service operators, but the only service provided by all the respondents.

Purchasing commitments for fertilizer are made year-round. Heaviest months, however, are January (27 percent), February and March (each 30 percent) and October (26 percent). Respondents indicate that June is the slowest month for ordering fertilizers for use by the commercial lawn services.

During peak season, 91 percent of the survey respondents employ as

continued...

LAWN CARE SERVICE OPERATIONS
Demographics

Nine services offered	Now Offered percent*	Plan to Add in 1982 percent*
Chemical applications (fertilizers, herbicides, etc.)	100.0	.....
Lawn dethatching	50.3	4.1
Ornamental/shrub care	49.7	3.4
Establishment of lawns from seed or sod	47.6	2.0
Lawn mowing	36.1	2.7
General tree care	30.6	5.4
Related retail products offered to customers for sale	12.2	2.0
Irrigation design, installation or maintenance	8.8	2.7
Interior pest control applications	6.1	5.4

*Adds to more than 100.0% due to multiple responses

LAWN CARE SERVICE OPERATIONS
Demographics

Employees During Peak Season	Percent
Applicators	90.5
1 or 2 applicators	24.5
3 or 4	23.8
5 to 9	26.5
10 or more	15.7
Median	4.5
Salespersons	68.8
1 salesperson	27.2
2	25.2
3 or 4	8.2
5 or more	8.2
Median	2.3
Other	65.3
1 or 2 others	27.9
3 or 4	16.3
5 to 9	8.2
10 or more	12.9
Median	3.5

LAWN CARE SERVICE OPERATIONS
Demographics

Gross Billings for 1981	Percent
Less than $50,000	9.5
$50,000 to $99,999	9.5
$100,000 to $499,999	53.1
$500,000 to $999,999	8.2
$1,000,000 or more	14.3
Not given	5.4
Median	$312,000

many as 10 applicators, although most firms (27 percent) stayed in the five to nine applicator-range. Salespersons were employed — as many as five or more — by 69 percent of those responding; and other types of employees were on the payroll of at least 65 percent during the busiest months.

Average billing: $312,000

Perhaps indicating that lawn service personnel stay busy, the median billing in this segment of the lawn and garden industry is $312,000 — with 10 percent in the under $50,000 bracket, 53 percent in the middle range of $100,000 to $500,000 and 14 percent, billing $1 million or more, annually.

Residential business comprises a good portion of the above figures: 96 percent of the lawn care respondents service residential accounts; 91 percent serve commercial establishments. Here, again, there is overlapping because the majority of firms handle both types of business.

As might be expected, the numbers of accounts are not static. In 1981, however, there was a slight four percent increase in residential accounts gained over the number of such accounts lost. Throughout the industry, the number of accounts (residential) per firm averaged 885. *Companies in their first year of business (six percent of the total number) were not included in the tables showing gains and losses of accounts.* ☐

*Survey was taken for *Grounds Maintenance* magazine, which, like **Lawn and Garden Marketing** magazine, is a publication of Intertec Publishing Corp.

ORTHO
ORTHENEX™
Insect & Disease Control

A SELL-OUT IN '82!

- Many dealers sold out early last year with this new breakthrough in rose and flower protection.
- ORTHENEX is the unique combination of ORTHENE®, Funginex® and Kelthane® that gives complete disease control...*plus* long lasting systemic protection against bugs.
- 1983 Advertising support will make demand even stronger.
- Don't lose out on big sales in '83...stock up now.

ORTHO
Chevron Chemical Company

Quality you can trust.

DON'T GET CAUGHT SHORT...GET ORTHENEX™

TMS: ORTHO, CHEVRON, CHEVRON DESIGN, ORTHENE, KELTHANE, FUNGINEX – REG. U.S.A. PAT & TM OFF.

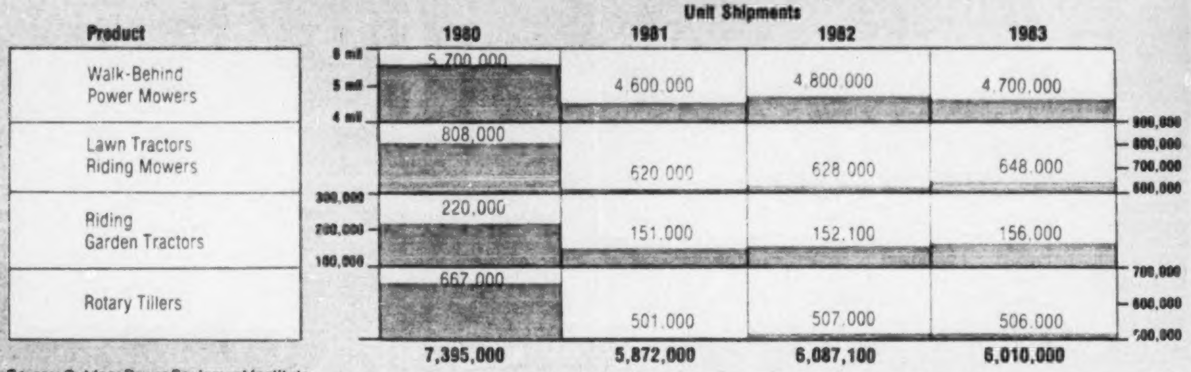
Circle (28) on Reply Card

BEST AVAILABLE CO

BEST AVAILABLE COPY

Power Equipment Shipments – units

(Includes estimates for '82, projections for '83)



Source: Outdoor Power Equipment Institute

Major categories

continued from page 62

$310,888,250 (**LGM**, June-July, 1982). Figures for 1982, just released by the BIA, show a retail value of barbecue grills at $407 million. In 1983, the combined barbecue, associated food, grocery and accessory market is forecast at $5.1 billion, going to $5.8 billion by 1985.

And 77 percent of all the U.S. households in 1981 are barbecuing households! Ten percent of these families own gas grills. Projections by Arkla Industries show that gas grills are expected to advance to 16.6 percent of the market by 1986.

Walk-behinds lag behind 1980

Not even the most incautious optimist would describe the Outdoor Power Equipment industry as being "on a roll." A roller coaster, maybe, gentled somewhat since wholesale shipment figures hit bottom in 1981: **a 24 percent drop from 1980 according to figures released** by the Outdoor Power Equipment Institute. For instance, from 4.6 million walk behind power mowers actually shipped in 1981, the OPEI projects a rise to 4.8 million in 1982 before descending to 4.7 million in 1983. ☐

AGAIN THE FIRST.
LATEST STATE-OF-THE ART

solo

SOLO ROTARY
LAWNMOWER MODEL 581

- Other push and self-propelled models with various cutting sizes available.

- 5 HP SOLO two-cycle engine — liquid/air cooled - automatic governor.
- Quieter than most electrics — 63 DBA sound level.
- Low fuel consumption — up to 4 hours of operation with two quarts.
- Lightweight, maneuverable — only 55 pounds.
- High impact plastic deck — rust/corrosion proof.
- Turbo grass discharge.
- 1½ bushel rear grass catcher.
- Single knob cutting height adjustment for all wheels.

Circle (30) on Reply Card

SOLO INCORPORATED • 5100 Chestnut Ave. • P.O. Box 5030 • Newport News, Va. 23605-0030 • (804) 245-4228 • Telex 823-644
Canada: Box 464, Burlington, Ont. L7R3V3

Plant sales below expectations

Data from a survey of retail members of the American Assn. of Nurserymen show that 1982 sales did not meet expectations of the retail segment. The survey showed that 42 percent of the respondents ordered more plants compared to Spring, 1981, but that 45 percent carried over more plants into the 1982 fall season than they did one year ago.

The national average reported was 1.1 percent more plants purchased for Spring 1982 sales than for Spring 1981. There were 2.3 percent more plants, per establishment, carried over into fall 1982 than were carried over into Fall 1981.

Q. "Did you purchase more, or, less plants for spring 1982 than for spring 1981 sales? (Include reordering in your calculations)"

	SPRING 1982	LAST SPRING (1981)
MORE	42% of firms	69% of firms
LESS	36% of firms	29% of firms
SAME	22% of firms	2% of firms

(The national average reported was 1.1% more plants purchased this spring than last.)

Q. "Will you carry more, or, less plants into fall 1982 than you did into fall 1981?"

	FALL 1982	LAST FALL (1981)
MORE	45% of firms	47% of firms
LESS	29% of firms	25% of firms
SAME	26% of firms	28% of firms

(The average reported nationally was 2.3% more plants carried over this fall than the previous year.)

REGIONAL STATISTICS

PURCHASES:

	Region 1		Region 2		Region 3		Region 4		Region 5		Region 6	
	'82	'81	'82	'81	'82	'81	'82	'81	'82	'81	'82	'81
More	55%	76%	54%	77%	25%	56%	36%	68%	63%	89%	25%	52%
Less	23%	24%	26%	22%	57%	41%	37%	28%	11%	11%	52%	44%
Same	22%	0%	20%	3%	18%	4%	27%	4%	26%	0%	23%	4%
+/-% of increase or decrease	+5.9%		+6.1%		-6.3%		-.4%		+9.5%		-7.1%	

CARRYOVER:

	Region 1		Region 2		Region 3		Region 4		Region 5		Region 6	
	'82	'81	'82	'81	'82	'81	'82	'81	'82	'81	'82	'81
More	46%	43%	50%	57%	39%	42%	43%	42%	45%	67%	50%	49%
Less	25%	28%	26%	17%	39%	34%	23%	26%	29%	6%	30%	25%
Same	29%	30%	24%	17%	22%	24%	34%	32%	26%	26%	20%	26%
+/-% of increase or decrease	+2.9%		+4.6%		-1.0%		+3.0%		+4.4%		+1.5%	

NOTE: Following are states included in each region....

Region 1: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Delaware, Quebec.

Region 2: Maryland, Virginia, West Virginia, Kentucky, District of Columbia, Tennessee, North Carolina, South Carolina, Florida, Georgia, Alabama, Mississippi.

Region 3: Ohio, Indiana, Illinois, Michigan, Wisconsin, Ontario.

Region 4: Minnesota, North Dakota, South Dakota, Iowa, Nebraska, Missouri, Kansas, Colorado, Wyoming, Saskatchewan, Manitoba.

Region 5: Texas, Louisiana, Arkansas, Oklahoma, New Mexico.

Region 6: Oregon, Washington, Montana, Idaho, Utah, Alaska, Alberta, British Columbia, California, Hawaii, Arizona, Nevada.

Nonfarm fertilizer frequently misclassified

With the total tonnage of fertilizer distributed in 39 reporting states down seven million tons from figures reported just two years previously (in 1979, 46 states reported), nonfarm fertilizer tonnage also took a dive. The nonfarm fertilizer tonnage reported for 1981 is 36 percent less than reported in 1979 and 38 percent less than 1980. Part of the slippage can be attributed to fewer states reporting.

Nonfarm fertilizer tonnage is very difficult to calculate according to David L. Terry, University of Kentucky, Lexington, Ky., who is secretary of the Assn. of American Plant Food Control Official's uniform state tonnage reporting committee. In 1981 reporting states estimated that actual nonfarm tonnage of fertilizer—assuming some misclassification—could vary as much as 18 percent from figures based on tonnage reports and other confirmed sources. When asked for the reason for the "misclassification," Dr. Terry pointed out that:

1. Companies sell commercial fertilizer in the larger-for-less agricultural packaging for nonfarm use and fail to make the distinction when reporting;
2. Large amounts of fertilizer are sold to the various state highway departments. This tonnage often is not separated from overall totals when reporting.

As opposed to agricultural use, "nonfarm" fertilizer is used by highway departments; and for parks, cemeteries, golf courses, home lawns and commercial and institutional grounds. In 1981, this represented approximately 2 percent of the total tonnage, based on actual reports.

Ohio concedes the greatest possibility of variance between nonfarm *reported* use and an estimate of *probable* usage: 58,403 tons reported in 1981; 100,000 tons theorized as actually used. Only Georgia, New Hampshire, Montana and New Jersey estimate a figure lower than they report for nonfarm use. Some states, however, make no estimates relevant to possible miscalculations.

Florida reported the largest tonnage for non-farm use, 163,127 tons, and made no contradictory estimates. California was second in 1981; but far ahead of all states in 1980 when a record 368,101 tons of fertilizer was reported.

TONNAGE OF NONFARM-USE FERTILIZER

	1980		Year Ending June			1981	
State	Total Tonnage of Fertilizer Distributed in the Fiscal Year Ending June 30, 1980	Nonfarm Tonnage Distributed Based on Tonnage Reports Received and Other Confirmed Sources	Estimate of Actual Nonfarm Tonnage Assuming Some Misclassification In Tonnage Reporting	State	Total Tonnage of Fertilizer Distributed in the Fiscal Year Ending June 30, 1981	Nonfarm Tonnage Distributed Based on Tonnage Reports Received and Other Confirmed Sources	Estimate of Actual Nonfarm Tonnage Assuming Some Misclassification In Tonnage Reporting
AL	962,616	.....	22,174	AL	1,008,740	.....	23,658
AK	.....	.....	.....	AK	.....	.....	.....
AZ	361,095	.....	10,800	AZ	345,677	.....	.....
AR	761,519	1,705	1,876	AR	883,813	2,746	.....
CA	2,750,000	368,101	341,250	CA	2,376,030	156,931	172,624
CO	463,841	35,505	35,505	CO	477,222	20,521	23,800
CT	63,769	.....	.....	CT	.....	.....	.....
DE	136,851	.....	.....	DE	169,038	.....	.....
FL	2,107,971	157,456	.....	FL	2,087,747	163,127	.....
GA	2,169,174	46,585	100,000	GA	2,198,674	40,534	20,000
ID	.....	.....	.....	ID	588,741	.....	.....
IL	4,539,809	46,283	48,597	IL	4,286,595	44,478	48,035
IN	2,843,384	63,133	68,000	IN	2,731,378	40,336	48,000
IA	3,847,091	6,531	7,623	IA	3,991,331	6,785	7,987
KS	1,637,150	12,243	.....	KS	1,599,087	11,683	.....
KY	1,046,349	10,880	24,000	KY	1,164,872	13,634	18,400
LA	.....	.....	.....	LA	.....	.....	.....
ME	102,204	3,862	4,012	ME	100,746	.....	.....
MD	445,182	22,780	45,500	MD	.....	.....	.....
MA	65,741	6,136	6,500	MA	68,780	7,130	7,300
MI	.....	.....	.....	MI	.....	.....	.....
MN	2,336,379	24,495	26,000	MN	2,531,364	28,081	30,000
MS	744,712	1,123	1,773	MS	881,498	1,851	2,000
MO	1,921,978	25,947	40,000	MO	1,885,461	25,528	40,000
MT	279,145	1,041	150	MT	340,491	1,256	150
NE	2,019,962	9,494	.....	NE	1,955,208	26,739	30,000
NV	30,560	.....	1,434	NV	22,258	2,196	.....
NH	24,482	3,555	500	NH	20,100	4,000	500
NJ	209,556	52,389	.....	NJ	198,270	58,584	49,864
NM	.....	.....	.....	NM	104,573	3,115	6,115
NY	627,695	73,134	.....	NY	.....	.....	.....
NC	1,815,232	31,356	50,000	NC	1,940,981	28,112	40,000
ND	774,149	.....	16,000	ND	737,830	14,756	.....
OH	2,369,946	67,721	100,000	OH	2,379,274	58,403	100,000
OK	868,750	13,600	15,000	OK	847,516	15,381	17,500
OR	545,271	6,267	4,500	OR	.....	.....	.....
PA	589,818	37,084	1,200	PA	585,100	35,381	.....
RI	9,960	3,602	1,500	RI	10,485	4,539	.....
SC	815,923	16,987	28,557	SC	870,861	15,715	26,125
SD	418,600	.....	5,700	SD	475,592	535	5,000
TN	775,653	11,059	.....	TN	885,854	11,239	15,000
TX	.....	.....	.....	TX	.....	.....	.....
UT	.....	.....	.....	UT	.....	.....	.....
VT	53,850	1,600	1,800	VT	52,835	1,900	2,200
VA	741,349	37,999	44,480	VA	744,390	36,880	44,663
WA	950,929	29,566	45,000	WA	1,047,216	29,680	32,000
WV	69,500	5,418	9,500	WV	57,674	5,967	8,000
WI	1,442,156	35,036	.....	WI	.....	.....	.....
WY	.....	.....	.....	WY	99,734	.....	.....
TOTALS	**44,739,801**	**1,269,849**	**1,106,931**	**TOTALS**	**42,750,536**	**917,943**	**778,961**

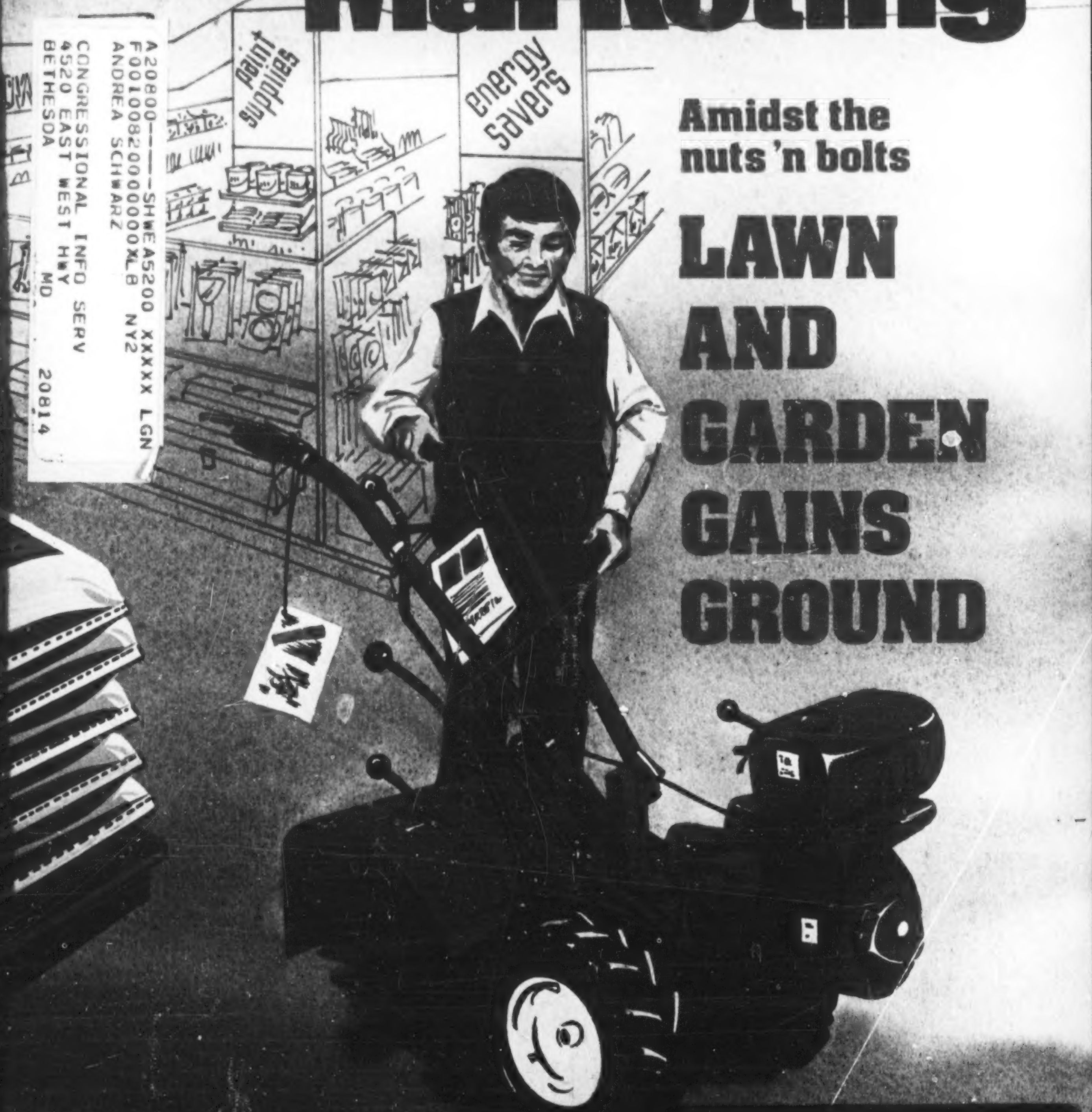
Source: Association of American Plant Food Control Officials Inc.

-1
C4725-2
1/28/83

JANUARY, 1983

Lawn&Garden Marketing

A20800----SHWEA5200 XXXXX LGN
F001008200000XLB NY2
ANDREA SCHWARZ
CONGRESSIONAL INFO SERV
4520 EAST WEST HWY
BETHESDA MD 20814


paint supplies
energy savers

Amidst the nuts 'n bolts

LAWN AND GARDEN GAINS GROUND

BEST AVAILABLE COPY

JANUARY 1983 VOL. 22 No. 1 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.

12 **Amidst the nuts 'n bolts, lawn and garden gains ground.** Edwin E. Bobrow, marketing consultant, tells a compelling story of successful home center marketing strategies; he also cites moxie and flexibility of lawn and garden specialists.

16 **Showy new seed packets: a turn-on for shoppers.** A report on trends in vegetable and flower seed merchandising, plus recent developments in lawn seed, including pre-coated seed and a switch from bulk sales to packages.

18: **Two winter shows.** It's westward, HO! for hardlines and L & G when the Winter NHS opens in Las Vegas. Southeast, in Miami, the Tropical Plant Industry Exhibition expects thousands.

21: **NESDA seeking changes in franchise agreements.** "New rules of the game" have been drawn up by the organization that represents servicing dealers across the country.

26: **Mower lineup finalized.** An update of walk-behind mower models offered for the first year of marketing mowers governed by new CPSC safety rules.

51: **On the road again—Industry EXPO at the malls.** A many-faceted lawn/garden/patio exhibit begins a 20-city tour Feb. 3.

DEPARTMENTS

2: **Editor's Notebook**
6: **Green Scene.** PBI-Gordon has selected "that special celebrity," George Toma. Knoll wins the C.A.N. Special Award.
9: **ABC's** (fifth in a series) of herbicides for point-of-sale use.
28: **Power Equipment Highlights.** Shipment data from OPE manufacturers, OPEDA meeting, new chainsaw kickback angle....
38: **Executive Forum.** The crisis of poor quality merchandise is the topic.
40: **People On The Move**
44: **Distributor News**
48: **Calendar**
50: **Potpourri**
53: **Manufacturers' Literature**

Coming in February: Amidst the nuts 'n bolts...part II: strategies of a major retailer will be featured. Continuing the update on marketing mowers—compliance and pre-standard mowers are being merchandised. How? The ABC's of DIY irrigation is number six in the basic information instructional series. And fall product sales will be summarized in the latest Product Movement Report.

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

Copyright 1983 INTERTEC PUBLISHING CORP. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, mechanical, electronic, photocopying, recording or otherwise without the prior written permission of the publisher. For information, address John Wickersham, 9221 Quivira Road, Overland Park, KS 66212.

Photocopy rights: Permission to photocopy for internal or personal use is granted by Intertec Publishing Corp. for libraries and others registered with the Copyright Clearance Center (CCC), provided the base fee of $2.00 per copy of article is paid directly to CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to publisher. ISSN 0091-4665/81 $2.00 + 0.00.

Power Equipment Highlights

Vol. 4 No. 1 January, 1983

Lawn tractors, riders lead the OPE industry

Key Lawn and Garden Shipments—1982 Model Year (Estimated)

Product	Unit Shipments 1982	Unit Shipments 1981	Change %	F.O.B. Shipment Value 1982	F.O.B. Shipment Value 1981	Change %
Walk-Behind Power Mowers	4,600,000	4,600,000	.....	$ 674 MM	$ 606 MM	+11.2
Lawn Tractors/Riding Mowers	654,000	620,000	+5.5	549 MM	453 MM	+21.2
Front Engine	393,000	370,000	+6.2	359 MM	291 MM	+23.4
Rear Engine	261,000	250,000	+4.4	190 MM	162 MM	+17.3
Riding Garden Tractors	146,000	151,000	−3.3	280 MM	266 MM	+ 5.3
Rotary Tillers	497,000	501,000	−0.8	143 MM	138 MM	+ 3.6
	5,897,000	**5,872,000**	**+0.4**	**$1,646 MM**	**$1,463 MM**	**+12.5**

Industry shipments of walk-behind power mowers, lawn tractors and riding mowers, riding garden tractors and rotary tillers show an overall modest increase of less than 0.5 percent for the shipment year ended Aug. 31, 1982 in comparison to one year ago, according to estimates by OPEI.

By product category, the best performance was lawn tractors and riding mowers which experienced a 5.5 percent increase over the 1981 model year. This past year, 654,000 units were shipped while 620,000 units were shipped in 1981. The factory value climbed from $453 million to $549 million, an increase of 21.2 percent.

The walk-behind power mower shipments remained flat at 4.6 million units while the F.O.B. factory value increased 11.2 percent from $606 million to $674 million.

Riding garden tractor shipments totaled 146,000 units, declining slightly by 3.3 percent compared to the 1981 model year total of 151,000 units. The F.O.B. shipment value increased 5.3 percent from $266 million to $280 million.

The 497,000 tillers shipped also represent a slight decline of 0.8 percent when compared to the 501,000 units shipped in the 1981 industry estimate. The F.O.B. value rose from $138 million to $143 million for a 3.6 percent increase.

OPEDA sets program for annual meeting; opens Feb. 6 in Florida

The Outdoor Power Equipment Distributors Assn. will hear a three-part discussion during the opening day of business sessions of their third annual meeting. Speaking on Monday, Feb. 7 will be Michael Ariens of Ariens Mfg. Co., Dennis Dix, executive director of OPEI; and Bob Larson, insurance administrator for the National Assn. of Wholesalers. Other featured speakers will include Dr. Richard I. Levin of the University of North Carolina. Subject: "If you were doing so much business, why don't you have any money?" The final business session on Wednesday will feature Bill Litwin, president of Kero-Sun Inc. and Maureen Pittman of the Wilson Learning Corp. OPEDA members will begin activities of their annual meeting on Sunday, Feb. 6. It will be held at Lake Buena Vista, Disney World, Fla.

More details may be obtained from John Kane, executive director, OPEDA, 1900 Arch St., Philadelphia, PA 19103.

Chain saw safety criteria modified

The kickback angle has been changed to 45 degrees instead of the original 60 degrees for electric chain saws of 15 amperes or below and gas powered chain saws with 2.5-cu. in. or smaller engines. The kickback angle is still 60 degrees for all electric chain saws above 15 amperes and for gas-powered chain saws with 2.6 to 3.8-cu. in. engines. This was approved when the American National Standards Institute committee met with the Consumer Product Safety Commission to modify acceptance criteria for chain saw safety, according to Donald Purcell, president of the Chain Saw Manufacturers' Assn.

Comment sought on log splitter standard

The Outdoor Power Equipment Institute Inc. (OPEI) has formally sent to the American National Standards Institute Inc. (ANSI) a Proposed B71.7 Safety Standard for powered log splitters. This proposal is applicable to consumer products, including powered hydraulic and mechanical ram units in addition to powered auger type log splitters.

Part of the ANSI approval process requires a public review of this proposal during which anyone may comment on the document. Those who would like to review and comment on the proposal are urged to contact: Mr. Edgar J. Mentz, Technical Director, Outdoor Power Equipment Institute, 1901 L Street, N.W., Suite 700, Washington, D.C. 20036.

For a digest of the NESDA—national association, servicing dealers—position paper on industry franchise agreements, see page 21.

-1 C4725-2 3/8/83

1983

Lawn&Garden Marketing

A20800----SHWEA5200 XXXXX LGN
F00100820000000XLB NY2
ANDREA SCHWARZ
CONGRESSIONAL INFO SERV
4520 EAST WEST HWY
BETHESDA MD

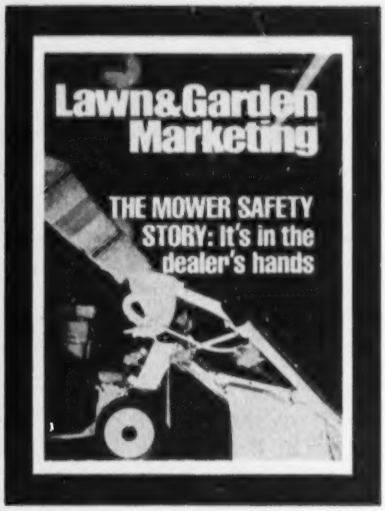
THE MOWER SAFETY STORY: It's in the dealer's hands

BEST AVAILABLE COPY

FEBRUARY, 1983 ☐ VOL. 22 No. 2 ☐ PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.



6 **The big mower safety story.** Dealers and suppliers are split on how to, or whether to, talk safety when selling mowers.

12 **Product mix varies with markets.** Featuring Scotty's 100-store Florida chain in the second of a series of two articles on merchandising lawn and garden products in home centers.

4 **Product Movement Survey, autumn, 1982.** Trends of nine product lines are indicated by the responses of dealers in several retail categories, reporting from the four major census divisions of the country.

32 **Quest for quality.** Products that fall short of consumer expectations have caused a backlash of mistrust. In the face of slipshod factory testing, some dealers turn to imports for the quality that customers demand.

DEPARTMENTS

19 ABC's of DIY Irrigation
22 Green Scene
30 Power Equipment Highlights
44 Product Briefs
60 Book Reviews
62 Distributor News
64 Calendar
66 People on the Move

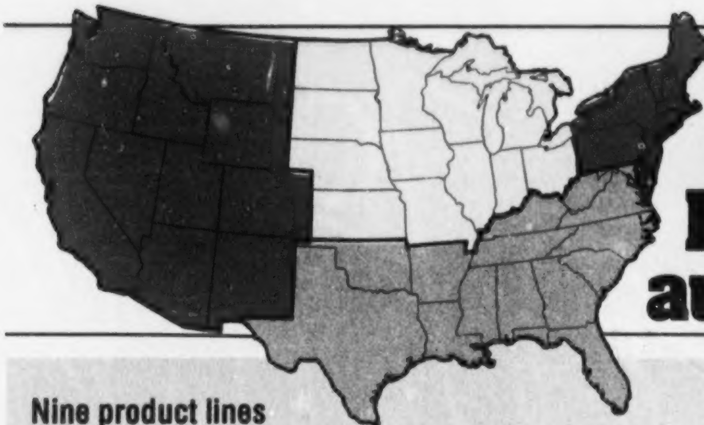
Coming in March: ***Growing the Market.*** Introducing a new series of articles on media celebrities, concerted actions by trade associations and individual retailer efforts to stimulate public interest in lawns, gardens and the broad spectrum of DIY horticultural projects and products. First in the series features the emcee of a radio talk show that stimulates gardeners in five states, Ralph Snodsmith of Station WOR. An update on patio products with emphasis on electronic bug killers and outdoor cookery. The ABC's of Long-handled Tools. An advertising executive discusses "When is a market expandable?"

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

Copyright 1983 INTERTEC PUBLISHING CORP. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, mechanical, electronic, photocopying, recording or otherwise without the prior written permission of the publisher. For information, address John Wickersham, 9221 Quivira Road, Overland Park, KS 66212.

Photocopy rights: Permission to photocopy for internal or personal use is granted by Intertec Publishing Corp. for libraries and others registered with the Copyright Clearance Center (CCC), provided the base fee of $2.00 per copy of article is paid directly to CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to publisher. ISSN 0091-4665/81 $2.00 + 0.00.



PRODUCT MOVEMENT REPORT, autumn, 1982

Nine product lines measured

		TOTAL %	NORTHEAST %	N. CENTRAL %	SOUTH %	WEST %
Grass Seed	Up	31.4%	26.9%	40.7%	42.1%	7.1%
	Same	39.5	50.0	33.4	21.0	57.2
	Down	14.0	3.9	22.2	15.8	14.2
Chain Saws	Up	18.0	7.8	26.3	20.9	7.7
	Same	36.3	26.8	34.2	50.0	38.4
	Down	18.0	30.8	10.5	8.3	30.8
Lawn Fertilizer	Up	37.7	33.3	47.1	38.5	25.0
	Same	41.5	40.0	29.4	53.8	50.0
	Down	18.9	26.7	23.5	7.7	12.5
Flower Bulbs	Up	27.9	30.8	25.9	26.3	28.6
	Same	27.9	26.9	29.6	31.6	21.4
	Down	5.8	3.9	7.4	5.3	7.1
Leaf Blowers	Up	16.2	13.3	17.9	16.7	14.3
	Same	35.3	40.0	21.4	55.6	28.6
	Down	10.3	13.3	14.3	5.6	.....
Snow Throwers	Up	25.6	33.3	21.4	NA	NA
	Same	44.2	33.3	50.0	.....	.....
	Down	18.6	26.7	14.3	.....	.....
Garden Tools	Up	10.5	11.5	14.8	10.6	.....
	Same	62.7	65.4	63.0	57.8	64.4
	Down	16.3	15.4	11.1	15.8	28.5
Kerosene Heaters	Up	11.7	6.7	7.1	22.4	14.3
	Same	17.7	20.0	17.9	22.2	.....
	Down	17.7	33.3	14.3	11.0	14.3

,Because of multiple responses, percentages do not add to 100%

	TOTAL	NORTHEAST	N. CENTRAL	SOUTH	WEST
Current Inventory of Chain Saws—MEDIAN	15.5	15.0	13.6	26.7	12.5

Products surveyed and types of outlets: chain saws, garden tools, grass seed and flower bulbs (discount, multi-department, variety and auto supply stores, drug stores and supermarkets). Hardware stores and home centers were asked about the same products. Farm equipment and power equipment store owner/managers answered questions about chain saws, leaf blowers/vacuums, snow throwers and kerosene heaters. Garden centers and farm supply stores reported on garden tools, lawn fertilizers, grass seed and flower bulbs.

Nine product lines sold through four key classes of retailers were measured by *LGM* to indicate trends but not to measure total retail sales volume.

■Retailers responding to the LGM Quarterly Product Movement Survey reported that fall grass seed sales were up significantly in the North Central and South regions. The Northeast region also showed an increase in this category but the West trailed considerably.

The West and the Northeast regions failed to show a net gain in chain saw sales but in the other regions—North Central and South—chain saws made a comeback compared to their recently depressed sales status. Sixty-one percent of the responding retailers from the North Central region reported chain saw sales that were about the same or increased. An even more noteworthy 71 percent of the southern retailers gave this same report.

Also noteworthy was the increased volume of sales of lawn fertilizer in the North Central region reported by almost half (45 percent) of the retailers. Thirty-five percent of those retailers indicated that sales volume for this category was up over 10 percent. Fertilizer sales also were up in the other three regions.

Flower bulb sales showed an increase in volume in all four regions. Sales of leaf blowers also increased.

Snow throwers showed a slight gain in sales over fall, 1981, with 26 percent of the respondents reporting a gain; 44 percent reporting sales volume about the same, and 19 percent reporting sales volume as being down.

Garden tool sales apparently decreased during this past fall compared to the same period of one year ago. Only the North Central region reported an increase—15 percent—in this category.

Kerosene heater sales volume also decreased, with the number stating that volume was down exceeding those who reported it was up. Eighteen percent reported unit sales volume as about the same.

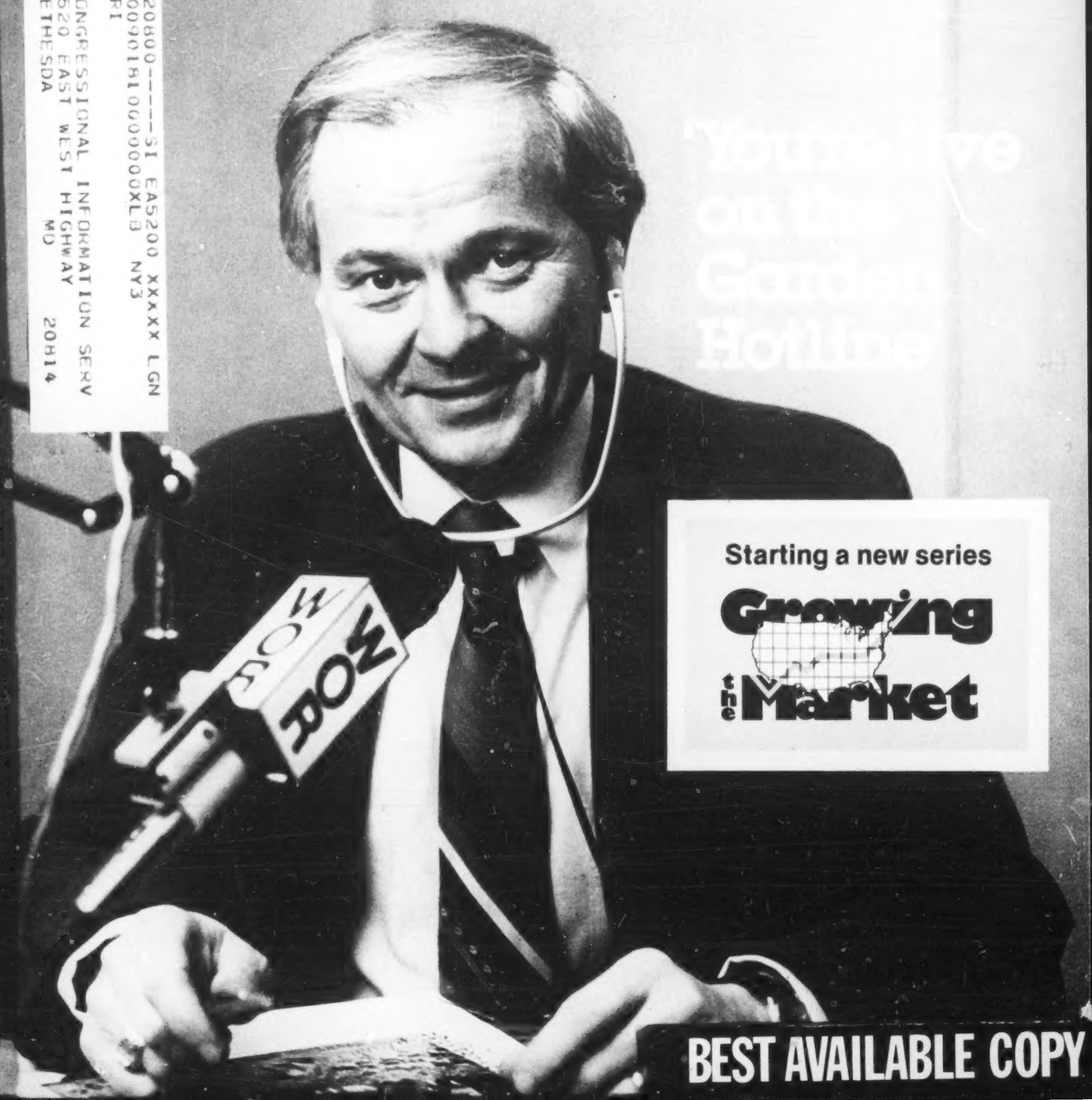
Brand names most frequently mentioned as having generated exceptionally good sales: Stihl chain saws; Kero-Sun heaters; Snapper walk-behind mowers; Fertilome and Greenview fertilizers and Ortho garden/lawn chemicals. Most of the well-known names in the industry were mentioned at least once. ☐

-/ C4725-2 3/22/83

MARCH 1983

Lawn&Garden Marketing

A20800----SI EA5200 XXXXX LGN
F009018100000XLB NY3
SRI
CONGRESSIONAL INFORMATION SERV
4520 EAST WEST HIGHWAY
BETHESDA MD 20814



'You're Live on the Garden Hotline'

Starting a new series

Growing the Market

BEST AVAILABLE COPY

MARCH, 1983 □ VOL. 22 No. 3 □ PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.

Growing the Market

The Growing the Market design is the work of Art Director Kevin Callahan. It represents LGM's conception of expanding the market for lawn and garden products. The desirability of these products is being communicated in segments to an awakening public. A united campaign by the media and industry can create a growing demand.

A GREAT GIFT IDEA
ING GRILL

30 **Patio products outlook bright.** Retailers give mixed reviews on grills, casual furniture and ICD's. Grills and accessories, alone, should be a billion dollar market by 1985, as projected by the Barbecue Industry Assn.

4: **"You're live on the Garden Hotline".** *Growing the Market, Part 1.* **LGM** interviews talk-show host, Ralph Snodsmith, of Radio Stations WOR and WRKL.

12: **The politics of landscape horticulture:** *Growing the Market, Part 2.* Dr. Eliot Roberts, president of The Lawn Institute, advocates landscape-market expansion accomplished by grooming public opinion.

16: **NMC: Exciting the public about plants:** *Growing the Market, Part 3.* By concentrating heavily on radio, the Nursery Marketing Council stimulates the public's desire for plants.

52: **New way proposed to map U.S. marketing regions,** Management Horizons Inc. recommends dividing the country into 15 areas of regionally similar characteristics.

56: **Mergers, Acquisitions, Changes.** Corporate changes of ownership affect Frank's Nursery, Spra-Rite, Armstrong Nurseries, Delta Industries, Neosho Products, Vaughan-Jacklin and Science Products.

DEPARTMENTS

2 Editor's Notebook
10 Green Scene
17 ABC's of Long-handled Tools
26 Feedback
28 Power Equipment Highlights
36 Product Briefs
55 Distributor News
58 Calendar
62 People on the Move
64 Potpourri
66 Manufacturer's Literature
69 Book Reviews

Coming in April-May: "How media personalities reach millions," *Part 4 of the Growing the Market series.* Included in returns of the Product Movement Survey, winter sales, will be retail inventory data on kerosene heaters. One retailer's experience with the FIFP campaign. The importance and profitability of indoor plants and supplies. And, the ABC's of spin trimmers.

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

Copyright 1983 INTERTEC PUBLISHING CORP. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, mechanical, electronic, photocopying, recording or otherwise without the prior written permission of the publisher. For information, address John Wickersham, 9221 Quivira Road, Overland Park, KS 66212.

Photocopy rights: Permission to photocopy for internal or personal use is granted by Intertec Publishing Corp. for libraries and others registered with the Copyright Clearance Center (CCC), provided the base fee of $2.00 per copy of article is paid directly to CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to publisher. ISSN 0091-4665/81 $2.00 + 0.00.

Cookery, ICD's, furniture

Patio products outlook bright

It's not for everyone, but quality-oriented retailers who follow consumer trends report good sales outlook. By Marjorie Riggin.

A GREAT GIFT IDEA
Lock-Top Grill... Lid locks on for take along
ING GRILL

One grill manufacturer reinforces the giftability of his product by easy-to-gift wrap (and display) packaging.

■Backyard furnishings represent a growing source of income for lawn and garden, hardware-home center and patio equipment dealers. The profitable demand for barbecue grills, electronic insect control devices, (ICD's) and casual furniture keeps their backyard money tree flourishing. For some, sales go on even during winter months when outdoor living retreats indoors.

Livonia, MI, doesn't sound like a place for year-round patio living, but, according to Fred Costello, manager of Jimmie's Rustics in Livonia, one type of outdoor living, barbecuing, never bows to the weather. It just moves closer to the edge of the garage. They carry Ducane grills, and their best seller is the $550, "everything-but-the-cook model." The trend, there, is to bottled gas. Grills are displayed and sold all year, many being bought as gifts.

At Jimmie's Rustics, Flowtron Electronic ICD's also are sold as gifts, although most of these sales are seasonal. The $169, two-acre coverage Flowtron sells best for this retailer.

1982 Apollo-award winner

Noting that casual furniture is the mainstay of their business, Costello reports trends to superior quality, and to all-weather cushioned furniture suitable for both deck and den. Jimmie's Rustics won the 1982 Summer and Casual Furniture Assn. (SCFMA) Apollo award. For 23 years, this award has been secretly voted by SCFMA member manufacturers in recognition of outstanding merchandising of this type of furniture at the retail level.

Good turns with ICD's

Ellis Inside-and-Out Garden Center, Mobile, AL, gets "very good turns from their Flowtron Electronic ICD's—especially in the $120 to $140 range," said Don Page, furniture manager. Barbecue grills are not so successful for them, however. Their Jacuzzis and other lines are "slow-moving, low-profit items." Casual furniture is "bread and butter," with high end and promos best in 1982, after two years when the medium-price furniture was top seller. January through September are Ellis' best months.

Grills show big increase yearly

Not quite year-round, but 10 months out of the year selling grills isn't all bad! The Fireplace and Bar-B-Q Center Inc., Overland Park, KS, has carried barbecue grills for "15-20 years, but only in the last three to four years have we really gone after the market," according to Steve Sweet, president. "We notice a big increase every year." Trends? "There constantly are more people switching to gas from charcoal."

The Fireplace and Bar-B-Q Center carries Charmglow, Arkla and Locke Stove Co.'s Warm Morning Broilmaster, which they feature. Selling best: natural gas, in the $300 price range. "More and more people are after quality...there also is an increasing demand for smokers. This is not a huge item, yet, but there is a market....(for their Cookin' Cajun)."

Electric smokers seem to sell best

continued...

Patio products outlook

...continued

for Hilscher Nursery in Fort Worth. Edith Bowers, buyer, told **LGM** that they "never go real heavy...but they like the electric Char-B-Que." Hilscher's changes lines of ICD's from time to time—are out of them, right now—and display furniture seasonally. The all-weather, cushioned wicker-type furniture, made of fiberglass, has found a ready demand in their market area.

Barbecue industry sales

(Retail Value—In Millions of Dollars)

	1982	1983	1985
Charcoal Briquettes	312.0	345.0	418.0
Barbecue Grills	407.0	436.0	497.0
Lighter Products	88.0	107.0	143.0
Tools & Equipment	25.0	27.0	31.0
Miscellaneous	3.3	4.0	4.6
	$835.3	**$919.0**	**$1093.6**

Source: Barbecue Industry Assn.

In Phoenix, the demand for backyard items peaks between late spring and early summer, according to Jo Teague, nursery buyer for O'Malley's Hardware and Building Supply Center. Teague also is president of the Arizona Nursery Assn. At O'Malley's, they've "gone in pretty heavily for a middle-of-the-road, $169 Sunbeam portable gas grill," which is much in demand in their part of Arizona. Teague reports that the Sunbeam Yardmaster ICD's affording half-acre coverage are selling most rapidly. O'Malley's is in the throes of remodeling—space is hard to come by for big, bulky items. Casual furniture presently is limited to porch swings and picnic tables.

A $436 million market

Very large merchandisers have not overlooked the fact that backyard money trees can grow for everyone. The barbecue market, for instance, is expected to amount to a lucrative $5-plus billion in 1983, advises Arthur W. Seeds, president of the Barbecue Industry Assn. This figure includes sales of all the products, including patio food, ancillary to the No. 1 item, the backyard grill, which, alone, is slated for $436 million in 1983 sales. In huge numbers, therefore, grills such as Arkla are sold under private label by Sears; and by chains such as Pay 'n Pak in Washington state, Save-Mart in Oregon and Caldor's in the East, to name a few. Weber grills sell widely under the J. C. Penney wing, for example; and are carried by big stores like Foley's in Houston.

Because grills are sold by such a variety of outlets, some garden centers consider them too competitive. In Denver, Wilmore Nurseries has backed off from the grill business. Ron Raney, manager, comments that they used to carry barbecue grills but phased them out. "You either have to be into grills really strong, or not at all. People like to see a BIG selection.

And then there's the dealer who has been unhappy with a grill manufacturer since last July. The dealer was out of natural-gas units and lost a large number of sales ("EVERYone is cooking out by July 4") because he couldn't get more of this type of grill at the right time from his distributor. The particular manufacturer would ship only in "kits," x-number of natural-gas grills *only* with the purchase of xx-number of bottled-gas models.

Exploring grill-market re-entry

Amling's Flowerland in the metro Chicago area got out of the grill business about four years ago; but George Gorss, general purchasing manager, says that they are exploring the market again. "There are reasonably priced, well-made units now available. Also, we feel we are better in merchandising (today) and can do a better job marketing these items." Soon there will be 16 Amling's outlets in and around Chicago.

Last year was Amling's first real year selling "bug lights." They were more or less "dabbling in a test market, and did a reasonably good job with the Magic Lamp." Priced $79 through $179, the $110 Magic Lamp ICD, covering one acre, sold best.

Amling's has been carrying casual furniture several years and is expanding the line this year. They will handle sets of Vandy Craft redwood, upper end Lyon-Shaw wrought iron; and a new company's (Mallin's) full line of powder-painted aluminum and steel, both cushioned and with strapping. This year, Amling's is "going a little lighter on the middle range of furniture because, in 1982, the absolute high end did very well."

Cashing in on the aftermarket

The Grandview Hardware Co., Santa Clara, CA, markets barbecue grills and accessories all year long. From the viewpoint of salesman E. S. "Slim" Caple, Arkla and Charmglow grills both sell well; but it's easier to get parts for the Charmglow line. "We do a big parts and service business and also send shipments of parts to other areas in California such as Fresno. Sometimes we just have to try to 'patch and fit' when there are no parts available."

Because Grandview features a comprehensive display of grill accessories, they are prepared to cash in on the $40 million gas grill accessory aftermarket.

Briquette replacement commands a big share of this aftermarket, says the C.B.E. Corp., producers of Perma-Coal natural pumice briquettes for gas-fired grills. And, according to the BIA, other gas- and charcoal-grill accessories also will provide hefty incomes in 1983: charcoal briquettes, $345 million; lighter products, $107 million; tools and equipment, $27 million and miscellaneous, $4 million.

Grandview buys their electronic

continued on page 42

Patio products outlook

continued from page 32

bug devices out of ACE, carrying Pied Piper and Chadwick. "In California, we also use a lot of chemicals..."

Grills are giftable

Robert Dreher, assistant manager in charge of the nursery and lawn and garden sections of the ACE Hardware/Home Center in Grand Island, NE, said that grills have become quite a gift item. They sell the W. C. Bradley line, from low-end charcoal to the $300 Char-Pit, as well as propane, portable grills.

Dreher said that his store offers a good price range in ICD's: Flowtron, Charmglow and Emerson. This is a very successful item, especially in the $100 bracket, mostly bought in the spring and summer, with a few selling for gifts.

Ivy Terrace, Keller and Plantation casual furniture lines have helped their furniture business "get bigger all the time." Last year, the medium-to-high price furniture sold best, with lower prices prevailing toward the end of the season.

Furniture fills a gap

Very unusual outdoor furniture and lighting fixtures—too formal to be called "casual"—are the forte of Creative Landscapes, Mexico, MO. Jim Kallenbach, owner and landscape designer, noticed a gap in the array of products available to his trade and started importing antique reproductions to use, to sell and to distribute. Furniture in cast "wrought" aluminum and in solid brass, olde-style park benches and English lampposts with multiple globes are all catching on. "As a landscaper, I have designed a number of areas, leaving the space (for furniture). The rest was up to the client. I decided to do something about it," Kallenbach told **LGM.**

...and spurs expansion

Larry Bachman, secretary of Bachman's Inc., Minneapolis, recently advised Western Nurserymen's Assn. members that casual furniture has been a great asset in expanding his company's business. And, according to Bachman's Bob Kremer, hard goods and furniture buyer, the firm is indeed selling its share of the $700 million in casual furniture that streams from the manufacturers each year. (See **Lawn & Garden Marketing** Magazine, October, 1982.)

Bachman's works with the big furniture suppliers, planning a year's stock in order to take advantage of early-order discounts, freight savings and extended dating. By late January, most of their furniture for 1983 was in their warehouse. This year, they are adding place settings, coolers and other accessories, to their casual living lines.

Kremer sees a definite trend to cushioning of Textilene-type fabrics, or to a good strap; and expects the middle-to-high ends to be most popular.

There was less enthusiasm for grills. "We've been in and out of the grill business. Right now, we're carrying them; but there's no money in it. Everything is selling at cost."

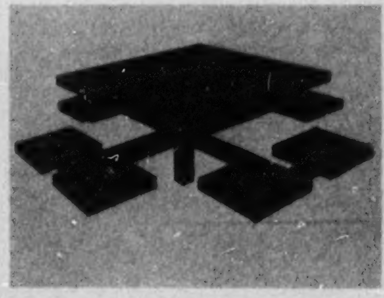
"With electric bug lights, we've switched around. They go in cycles...last year was a BIG year; we have nothing left. Going back, we'll probably go with Flowtron, again. With (ICD's), you need to stay with a good brand." ☐

Product briefs

...continued

made of kiln-dried hardwoods and heavy steel. The swing hangs from a circular metal frame. Wood used in the decking is treated to resist insects and inclement weather. The frame scroll is designed to be used as a trellis for climbing vines or for hanging flower pots and plant baskets. A bench and chair are made to match the swing. The line comes in a variety of colors. **George Mayer Manufacturing.**

Circle (119) on Reply Card



The **Square Table Bench** is constructed of durable woods and steel, for optimum function and durability in adverse environments. The table top is 47 inches square and bench tops are 15 inches square. Finish is clear pentachlorophenol preservative of Olympic Stain. Pedestals are of steel and finished with rust- and wear-resistant bronze, powder-coated, oven-baked epoxy. **Mancotta Corp.**

Circle (120) on Reply Card

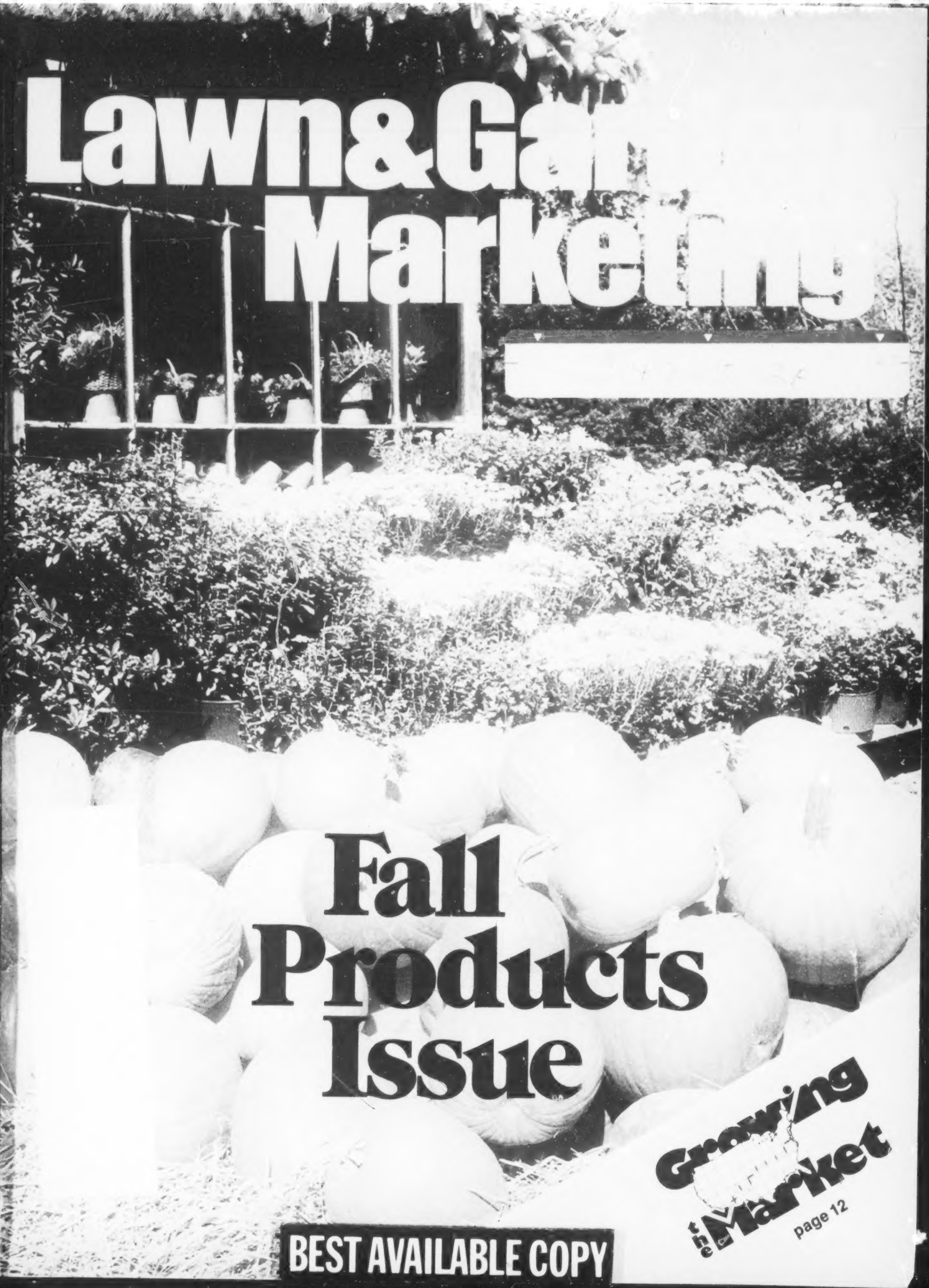
A **Grecian style planter,** molded in thick, white UVI-inhibited polypropylene, is not affected by sun, rain or frost. A sand-textured finish gives it the feel of stone. Stone paint can be used to match the color of stone. The 18-in. diameter, 16-in. high planter is made in two pieces for compact shipment and storage. The design includes provisions for drainage. **Polly Products Co.**

Circle (121) on Reply Card

The **611 AV chain saw,** based on the 610AV, has been upgraded to include a 4.5 hp, 47cc two-cycle engine, operating in the 5500 to 8000 rpm range with chain speed of 16 m per second. Overheating or loss of power during longer periods of use are eliminated because of the cool running engine. It is relatively stall proof, has reduced fuel consumption and features an anti-vibration handlebar design for easier handling. **Solo Inc.**

Circle (122) on Reply Card

Lawn&Garden Marketing



Fall Products Issue

Growing the Market

page 12

BEST AVAILABLE COPY

APRIL/MAY, 1983 ☐ VOL. 22 No. 4 ☐ PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.

Cover photo by Derek Fell.

6 PRODUCTS AND PROMOTIONS: A new wave of fall sales support—Forty-two state and regional associations voice unanimous interest in supporting FIFP again in '83.

One retailer's story—Country Market Nursery, Mechanicsburg, PA, enjoys a healthy boost in sales coincidental with their FIFP program.

12 Retailers: are you tuned in? Your best customers are listening to radio and TV gardening communicators, 18 of whom are presented here as a sampling of the garden media network, interviewed across the country by **LGM.** Shown, Virginia Beatty, Chicago.

24 The Las Vegas show debuts: There are mixed reviews as to how effectively the lawn and garden industry fits in.

30 Indoor green scene update: Forty million households are still maintaining houseplants; averaging 25 plants in each home.

38 POWER DISTRIBUTORS: Under state of seige—To attendees at the OPEDA 3rd annual meeting, Michael Ariens, president, Ariens Co., points out industry problems and solutions.

Unite under OPEDA—Gary Merrill, president of Crandall-Hicks Co., is new OPEDA president; membership of 111 includes 24 associate members.

54 Product movement report: From the four U.S. Census regions, lawn and garden product retailers report sales of winter merchandise.

DEPARTMENTS

17 ABC's of Spin Trimmers
22 Power Equipment Highlights
28 Green Scene
46 Product Briefs
56 Distributor News
60 Feedback
63 Potpourri
64 Calendar
66 People on the Move

Coming in June: "Growing the Market: Organizations and Objectives," Part 5 of the eight part series. The status of demand and of inventories of kerosene heaters, chain saws and related products will be updated; and a Trim-a-tree merchandising story will describe one retailer's success with quality holiday items. Power equipment articles will include the ABC's of chain saws and an update of the snow thrower market. In Green Scene: the All-America selections.

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

Copyright 1983 INTERTEC PUBLISHING CORP. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, mechanical, electronic, photocopying, recording or otherwise without the prior written permission of the publisher. For information, address John Wickersham, 9221 Quivira Road, Overland Park, KS 66212.

Photocopy rights: Permission to photocopy for internal or personal use is granted by Intertec Publishing Corp. for libraries and others registered with the Copyright Clearance Center (CCC), provided the base fee of $2.00 per copy of article is paid directly to CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to publisher. ISSN 0091-4665/81 $2.00 + 0.00.

INDOOR GREEN SCENE UPDATE

Hard work brings good sales and fair profits. That is the basic finding of interviews with suppliers and retailers of indoor plants and supplies. By Steve Trusty.

■Is the bloom off the indoor plant-care market? The majority of the people contacted for this report feel that it is still a very viable market and, when properly merchandised, still can be quite profitable. Some retailers have dropped plant-care items from their lines. Other manufacturers say that 1982 was their best year ever.

According to the Gardens for All/Gallup-National Garden Survey in 1982, 48 percent of all U.S. households owned indoor houseplants. This amounts to 40 million households and compares to 41 million households or 51 percent for 1981. Because the question on the survey was changed in 1981 it is not possible to compare the 1981 and 1982 figures with previous years.

According to a spokesman at Duraco Products Inc. (the successor to Phillips Products Inc.) the number of plants per household has increased. Phillips Products had surveys conducted covering the years 1975-1981. In that time period the number of plants per home increased from 10 plants in 1975 to 21.9 plants in 1981.

25 plants per household

Half of those polled expected to increase that number even more. Although no official survey was conducted in 1982, the spokesperson at Duraco stated that they felt the average was now about 24 or 25 plants per household. This is based on their sales for 1982, which were a record for the company. Duraco is projecting a real increase of 5 to 7 percent for 1983. Actual sales for the first two months of 1983 are running ahead of those expectations.

Peter Poz of Cord Crafts Inc. reported that their sales were up 15 percent in 1982 over 1981. He also stated that 1983 was starting strong. He declared "innovation is very important" if a company wants to move ahead. Cord Crafts has an extensive line of macrame hangers. Another manufacturer of macrame hangers is Klapat Textiles. Ronald Johnson of Klapat reported that company has had a steady increase in sales over the last eight years. Johnson stated that "continuity is important" and "the market is still good if you go after it."

Herb Stanley of Handy Hardware Corp., a manufacturer of hooks and brackets, reports that business is still good. "The buyer is more sophisticated and our product line has become a staple." Stanley suggests that if a retailer feels he got burned on the indoor plant-care market, that he should go over his figures very closely. "If the staples moved well, and the things that were left were the garbage, then maybe it wasn't a bad category after all." Stanley also stated that those stores that have stayed with the basics are doing very well.

Some of the potting soil people indicate that 1982 was a good year. The sale of the large bags was off due to the lack of housing starts, but overall sales were good.

A spokesman for Burnett Mfg., a maker of plant stands and poles, reported that their overall sales were up. The lowend items were down, but the consumer was trading up to the better items. "The consumer wants quality."

Doak Schoeneman at Homecraft reported that 1982 sales were up over 1981. They experienced a drop off in '78 and '79, but sales have gone up since then. "The indoor plant-care items are still a very viable part of our total business," according to Schoeneman.

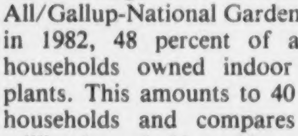
Packaging and planograms

Vincent Moran of CDP Inc., a manufacturer and importer of clay and ceramic planters, reports that business is good. He stated that "packaging is important and planograms are important. They make it easier for the buyers."

According to Adrian Roth Graham of Prestigeline Inc., plant lights are again a good category for them. Sales leveled off a couple of years ago, but have picked up somewhat again. They are looking forward to good sales in the future. "The consumer is going more decorative and more into track lighting," states Graham.

continued...

About the author: **Steve Trusty,** newly appointed contributing editor to **Lawn & Garden Marketing,** brings to our readers a wealth of experience gained during decades in the business. Trusty has operated a wholesale lawn and garden distribution business for nine years, preceded by years of experience in retailing, in working as a rep for manufacturers, writing newspaper columns and in hosting radio and TV talk shows in Omaha. As a member of the National Lawn and Garden Distributors Assn., he helped develop a retail clerk training program for NLGDA members and their customers. His newly formed firm, Trusty & Associates, will serve as consultants to retailers, suppliers and landscapers, and has supplanted his recently discontinued wholesale firm.



Ferns—
your choice
$3.99

Consumer involvement in foliage plants remains high, Gallup study shows. One firm, Flowerama, finds sales increased with reduced retail prices.

Distribution of Florida Foliage Sales (by type of market outlet)

Outlet	Share of Sales 1975	Share of Sales 1981
	Percent	
Retail garden centers, florists	13	34
Wholesale greenhouses, florists	32	31
Brokers	21	15
Mass market, grocery & department stores	22	10
Other Florida growers	9	8
Interior and landscape	2	1
Other	1	1
TOTAL	100	100

Source: European Market Potential for United States Tropical Ornamental Foliage Plants for U.S.D.A. Foreign Agricultural Services

Indoor green scene

continued...

Although the appearance of new products is not as profuse as it was a few years ago, products are being improved and new products are coming on the market. One new eye-catching item at a recent show was an indoor ground cover made of cork. It tops off the planter nicely, is light, should retard evaporation, and comes in a variety of colors. The product is called Nature Cover and is made by Nature Preserved Ltd. of Chicago.

Trends in planters

Most of the planter manufacturers consulted agreed that the larger planters are outselling small ones. In ceramic, the 6- to 8-inch decorative planters have the edge. In plastics the 8- to 12-inchers are the best sellers; larger than 12-inch planters are enjoying a fairly heavy demand. As to color, earthtones are still the most popular, and pastels are on the way out or "dead" according to one manufacturer. Vincent Moran of CDP states that "decorative ceramic planters can offer the most profit dollars per square foot of selling space."

Misco Enterprises has a new 12¾-inch pot that has a clay, or terra-cotta look, and holds a 10-inch grower pot. According to Howard Fine at Misco, this should be a very popular size and style, and comes with, or without, casters.

Distributors have given mixed reports as to the market. Generally speaking "the basics are selling well." Retailers located in good traffic areas are selling accessories well. One manufacturer stated that "distributors who aren't doing well in indoor plant-care items have order-takers (as sales persons) on the road." He went on to say, "those retailers and distributors who are working hard and merchandising the category are doing well." There seem to be enough people doing well to lend credence to that statement.

A retailer in Omaha states that his sales of plants and related items have gone to the more expensive items and that these buyers who buy expensively are the people who have the questions.

Flowerama's 100-store chain gains

Flowerama, headquartered in Waterloo, IA, and supplying 13 company-owned and 87 franchised stores, in 31 states, reports sales of green plants were up five percent over the last two years. Their greatest increase has been in cut flowers—up 50 percent over the last two years. Their total business is up 25.8 percent. Their overall product mix is 20 percent blooming plants, 30 percent hard goods, 30 percent cut flowers, and 20 percent green-foliage plants. Their mix in 1975, was 40 percent green-foliage plants, 40 percent hardgoods, and 20 percent cut flowers. They have gotten completely out of starter plants. Six-inch to 10-inch pot plants are the most popular. The green-plant market for the Flowerama group dropped off two or three years ago, but is growing again. Maurice Frink, president of Flowerama, feels this is due to their bringing truckloads of plants into Waterloo direct from the grower and then shipping fresh plants to the stores as needed.

Shopping-center traffic

By providing quality plants at better prices, they can sell more. All of the Flowerama stores are located in regional shopping centers so they have good traffic. Flowerama also has found that they can increase sales and profits by "accessorizing" their plants. They add not only bows and foil, but little figures, extra flowers, and even small plants. European dish gardens also are very popular. These are planted in shallow containers, put in baskets, and have flowers and decorations added. Both flowering and foliage plants are used. This creates an impulse item that makes a good decoration or gift. "Flowerama uses mass display, impulse pricing, and quantity buying to maintain good margins," according to Dianne Gerrans, merchandising consultant.

Fertilizers and chemicals

Jim Lieto, staff planner with Ortho, reported that company's sales of houseplant-related items have continued to grow. These increases have stayed pretty close to the forecasts made by Charles H. Kline & Co. in 1980. Their forecasts were that houseplant fertilizers would increase in constant dollars 2 to 2.5 percent per year, and houseplant insecticide sales would increase about two percent a year, in constant dollars. In 1980, according to the Kline study, 45 percent of the people who had houseplants, used a houseplant fertilizer, and 7 percent used insecticides. Those figures are now better than 50 percent, using fertilizers, and better than 10 percent, using insecticides, according to Lieto. One reason that more plant foods than insecticides are used, is that more home owners tend to throw away a sickly plant, than try to diagnose the problem, and treat it. They fertilize on a more regular basis to keep the plant healthy.

At least one Florida wholesaler is making it easier for a retailer to stock plants on an "as needed" basis. United Brands Floriculture Inc., has come up with a specially designed shipper for UPS handling. Each box holds either eight plants in

continued...

Indoor green scene
continued...

6-inch pots, or two plants in 10-inch pots. The plants are packed to survive UPS handling and arrive clean and fresh. The retailer only has to buy one case at a time, if he wishes. This program should supply better quality plants for some dealers' shelves. With many UPS shipping restrictions now lifted, a retailer could get several cases at a time, if his sales warranted it.

Joan Lombardi of United Brands also stated that these special shippers are used extensively by some major companies for handling their mail orders.

Changes in distribution

Due to USDA funding cutbacks, there is not a great amount of current data available on the total sales of foliage plants in the United States for 1982. We also do not have much information available on the state level. We do know that sales were down in 1981 over 1980, in potted plants from California. It is felt at this time that sales in 1982 also were down, primarily due to an oversupply of material and price cutting that came about to move that oversupply. The Florida figures probably would not be too different from that. Thanks to separate studies conducted by the Agricultural Market Research Center, at the University of Florida, in 1975 and 1981, we do have comparative figures on the distribution of Florida foliage by market outlet. (See table.) These figures show that retail garden centers and florists are buying more Florida foliage, and mass markets, grocery and department stores are buying less, on a percent of sales basis.

Bob Davis, president of Heinl's Nursery, in Miami, FL, reports that their sales are running counter to the chart. Heinl's has 100 acres of plants, and 1982 was their best year ever. Their fiscal year begins Sept. 1, and so far this year's sales are ahead of last year's. Fifty percent of their sales are to mass merchants and supermarkets. Most of the other 50 percent are to brokers and wholesalers. Their greatest increase in sales was in the 10-inch containers, with eight-inch next. Availability of 14-inch plants has quadrupled this year, and almost all of that is going to mass markets and supermarkets. Sales of all sizes of pots went up at least some last year, except 2.5-inch and smaller, and those sales went down. Davis stated that "the good nurseries are going to continue to grow," and "quality growers that cater to their market are going to see their business grow."

The indoor-plant and indoor plant-care market is not the "anything goes" market that it seemed to be in the early-to-mid-seventies. It now takes hard work to have good sales and make a fair profit. The market is there, and can, and will, continue to grow for those people who set their sights on it, plan accordingly, and offer quality and service. By cutting down on the number of bad experiences the home owner has with poor quality or bad service, the suppliers and retailers can increase the percentage of households growing houseplants, and the number of plants per household. ☐

BOOK NOW...
to be assured of a Fall inventory of

plantex T.M.

The water soluble fertilizers with a formula for every home and garden purpose. Plantex is manufactured by Plantco Inc. and has already been acclaimed as one of the finest and most attractive lines of completely water soluble, fool-proof fertilizers available anywhere in the U.S.A.

MAKE YOUR HOUSEPLANT HEADQUARTERS WORK FOR YOU THIS FALL TO GENERATE BIGGER PROFITS... INCLUDE plantex

See your distributor or phone our 'grow line' now.

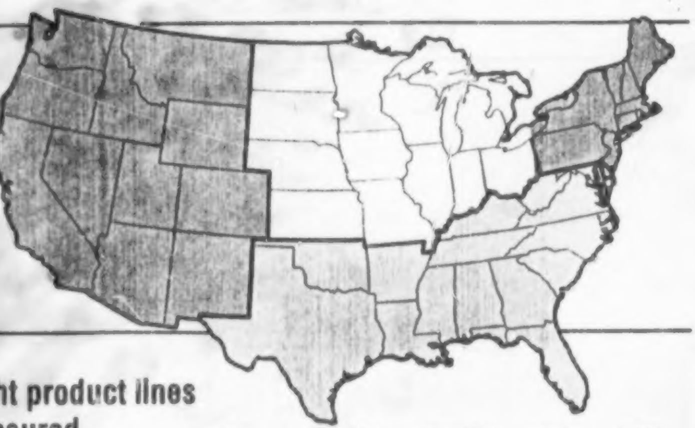
PHONE COLLECT – TEL: (416) 793-8000
PLANTCO INC., 314 ORENDA ROAD, BRAMALEA,
ONTARIO, CANADA, L6T 1G1

Circle (18) on Reply Card

All Seasons Container Fertilizer
Starter Fertilizer
20-20-20

Product Movement Report, winter, 1982-83

Eight product lines sold through four key classes of retailers were measured by *LGM* to indicate trends but not to measure total retail sales volume.



Eight product lines measured

		TOTAL %	NORTHEAST %	N. CENTRAL %	SOUTH %	WEST %
Bird Feeders	Up	21.7	30.2	25.0	12.7	14.8
	Same	44.2	34.9	45.7	43.6	55.6
	Down	12.9	16.3	14.1	7.3	14.8
Horticulture & DIY Books	Up	9.2	10.5	6.7	13.3	6.7
	Same	48.6	57.9	42.2	43.4	66.6
	Down	11.0	5.3	11.1	10.0	20.0
Indoor Plant Supplies	Up	15.2	14.0	17.4	14.6	11.1
	Same	53.9	65.1	48.9	50.9	59.3
	Down	9.2	9.3	9.8	10.9	3.7
Kerosene Heaters	Up	11.5	11.1	9.6	11.5	20.0
	Same	8.1	5.6	10.4	6.6	6.7
	Down	37.3	37.0	40.0	39.3	23.3
Replacement Parts	Up	40.9	66.7	27.9	41.7	44.4
	Same	32.2	20.0	33.8	36.1	38.9
	Down	24.3	13.3	38.3	13.9	11.1
Snow Throwers	Up	11.5	20.3	12.1	3.3	10.0
	Same	21.9	35.2	23.5	11.5	13.3
	Down	26.2	20.4	43.5	3.2	16.7
Tractor Attachments	Up	5.3	6.7	4.4	8.3	.....
	Same	39.4	46.7	39.7	41.7	22.2
	Down	29.6	26.6	33.8	25.0	27.8
Trim-a-Tree	Up	17.4	31.6	15.6	16.6	6.7
	Same	17.5	15.7	20.0	16.7	13.3
	Down	6.4	5.3	8.8	....	13.3

Because of multiple responses, percentages do not add to 100%

	TOTAL	NORTHEAST	N. CENTRAL	SOUTH	WEST
Current Inventory of Kerosene Heaters (MEDIAN NO. OF UNITS)	11.0 units	17.5 units	8.8 units	12.9 units	9.2 units

■Retailers responding to the quarterly product movement survey reported an overall flat sales curve for the 1982-83 winter selling season. In five of the eight categories, retailers reported that sales were about the same as last year. In two categories, retailers reported decreased sales, and a sales increase was indicated in only one category.

Bird feeder sales stayed about the same for the year, but more responding retailers indicated a sales increase than indicated a decrease. A 30 percent increase in sales reported from the Northeast was significantly higher than the national average.

Sales of horticulture and DIY books stayed about the same, but more retailers reported sales to be down than up.

Indoor plant supplies were reported to be flat in all regions this year, as they were last year. There were more retailers, however, reporting increased sales than decreased sales in this product group.

Kerosene heaters, which were a big selling item during this season last year, declined in sales this year, probably because of the bad publicity they suffered earlier. Sales were down 37 percent as a national average and regional percentages hovered close to that percentage, except in the West, where they were down 23 percent.

Replacement parts are still selling well, though the rate of increase is tapering off. Nationwide, sales were up according to 41 percent of the responding retailers, compared with 70 percent last summer and 65 percent last spring. The Northeast and North Central regions deviated from the national average; the Northeast reported 67 percent had increases while the North Central reported increases for only 28 percent of the retailers and decreases for 38 percent.

The mild (or late) winter kept snow thrower sales down throughout the nation. Twenty-seven percent of the responding retailers said sales were down compared to last year. Sales were flat in the Northeast and South regions, but down significantly in the West and particularly in the North Central region, where 44 percent reported decreases.

In the 1982 spring product movement report, **LGM** said that garden tractor sales were below expectations. The slump in tractor sales also has created a slump in tractor attachment sales. Only 5 percent of the retailers reported sales to be up, but 69 percent reported sales to be the same or down.

Trim-a-tree products did well this year. Sales were the same to better according to 35 percent of the retailers. The Northeast showed a 32 percent increase and the South sent in no reports of decreased sales.

Brand names most frequently mentioned as having generated good sales were Stihl chain saws, Snapper mowers, Toro snow blowers and Kerosun kerosene heaters. ☐

6/21/83
C4725-2A

JUNE 1983

Lawn & Garden Marketing

A20800----SI EA5200 XXXXX LGN
F009018100000XLB NY3
SRI
CONGRESSIONAL INFORMATION SERV
4520 EAST WEST HIGHWAY
BETHESDA MD 20814

AMERICAN ASSOCIATION OF NURSERYMEN
AAN
BEAUTY·VALUE·SERVICE
Gardens for All
ALL AMERICA SELECTIONS WINNER
Better LAWN and TURF INSTITUTE
bedding plants, inc.
IMPORTED HOLLAND BULBS
page 6

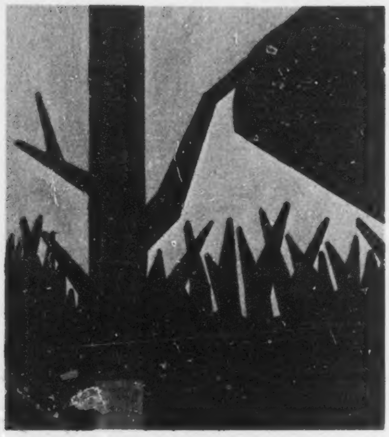
Shaping and coloring the public message

BEST AVAILABLE COPY

JUNE, 1983 VOL. 22 No. 5 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.



6 **Shaping and coloring the public message.** Individually and collectively, trade associations add impetus to consumer purchasing. Part 5 of the "Growing the Market" series describes associations' significance to the industry.

Cover: Original art by Kevin Callahan.

20 **Profile of a Trim-A-Tree retailer.** From year-to-year, the Henry Field Seed and Nursery Co., Shenandoah, IA, orchestrates Christmas merchandising for comfortable profits from giftable lawn and garden products as well as from ornaments and trees.

10 **Garden Writers.** Skilled in communication, members of the Garden Writers Assn. of America link trade associations, suppliers and the media.

28 **Kerosene Heaters: Hot button to panic button—and back?** As the market appeared to cool, industry debates heated up; heaters' safety statistics will help sell in '83-'84.

34 **The energy revolution still revving the market.** The demand for forest products continues to climb; wood-heating and wood-harvesting technologies can influence the market.

DEPARTMENTS

2 Editor's Notebook
12 Power Equipment Highlights
13 ABC's of Chain Saws
16 Green Scene
18 Feedback
31 Feedback Reply Card
42 Product Briefs

Coming in July: A sneak preview of who's exhibiting at major lawn and garden shows this summer and fall. Tips from a marketing consultant on negotiating the best terms at the upcoming shows. How a celebrity spokesperson spurs public demand—part 6 of the Growing the Market series. For ready reference: the ABC's of Lawn Seed.

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

Copyright 1983 INTERTEC PUBLISHING CORP. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, mechanical, electronic, photocopying, recording or otherwise without the prior written permission of the publisher. For information, address John Wickersham, 9221 Quivira Road, Overland Park, KS 66212.

Photocopy rights: Permission to photocopy for internal or personal use is granted by Intertec Publishing Corp. for libraries and others registered with the Copyright Clearance Center (CCC), provided the base fee of $2.00 per copy of article is paid directly to CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to publisher. ISSN 0091-4665/81 $2.00 + 0.00.

The energy revolution: still revving the market

A look at the trends in sales volume of wood-heating devices suggests a continued demand for chain saws, log splitters and other wood-harvesting equipment. By Marjorie Riggin.

■Chain saw sales were trimmed down but not out in 1983. While some manufacturers decry sales slippage since 1979's peak, others report profits or prepare to compete for market share.

Tanaka Kogyo (USA) Co., Ltd., is an example. The main focus of Tanaka's fall dating program is on its chain saws. This product line, for this company, is relatively new on the U.S. market. Five models of chain saws are being highlighted with special introductory prices effective through Oct. 1 in order "to make a high-quality saw available at a low price for dealers," says Richard Hulbert, general manager for Tanaka. This, despite the fact that shipments of chain saws reportedly have declined 54 percent since 1979.

The company's fall dating program emphasizes chain saws over its blowers, sprayers, ice augers, drills, pumps and generators. Tanaka appears to be joining those manufacturers who are taking an optimistic view of the 1983 chain saw selling season.

Shipment increases expected

A survey of Chain Saw Manufacturers Assn. members, conducted by the association, indicates that most manufacturers believe that the volume of shipments for 1983 will increase as much as 8 percent. A few believe that the increase will range between 15 percent and 20 percent and the remainder expects the sales in 1983 to stay at the 1982 level of 1.4 million gasoline-powered units shipped (22.8 percent fewer than were shipped in 1981). No figures for shipment of electric units have been made available for 1982.

See related article on page 28

Stihl Inc. anticipates the 8 percent increase. This firm can validate its optimism; the sales volume of Stihl chain saws has advanced steadily—113 percent—during the 1979 through 1982 years of market decline. Stihl's market share increased 27 percent in 1982, in contrast to that 22.8 percent industry slippage.

Old saws, new market

In 1983, Stihl expects at least 1.2 million of the saws that will be sold to be replacements for worn equipment. Prior to 1982, according to industry data, approximately 30,238,750—better than one of five—of the U.S. adults over 18 owned a chain saw of indeterminate age and condition. This is based on the U.S. Dept. of the Census estimates of the over-18 population numbering 166,147,000 on July 1, 1981.

Also in 1981, 43 percent—over 13 million—of these owners lived in suburban areas surrounding cities. Seventy five percent—22.8 million—reported incomes in 1981 over $25,000. During that year, industry data estimates that the average price of chain saws purchased was $202 per unit. Stihl's sales figures disagree.

Higher bracket saws sell

Stihl has experienced steadily rising sales of its higher bracket models culminating, in 1982, with a 29 percent increase in sales of chain saws with a retail price over $300. This appears consistent with the generally higher income levels recorded for chain saw owners.

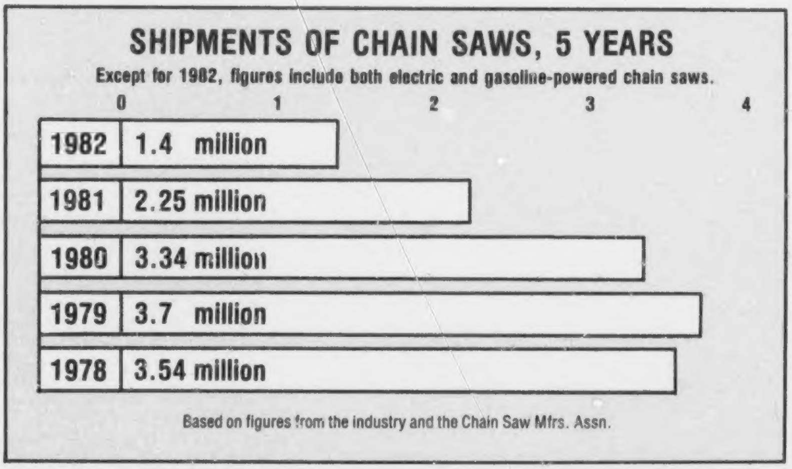
Ignoring the gloom and doom economy, Stihl distributors and retailers concentrated on the highest number ever to be *employed* in the United States: 99 million. Even the jobless were an asset to the chain saw business, turning, as some did, to woodcutting to help supply the more than 33 million cords of firewood consumed in 1982.

World-market view

For 1983, 36 million cords of firewood will be needed, according to projections. Housing starts, at a critical ebb during 1981 and most of '82, surged 35.9 percent in January, 1983—the highest one-month rise since 1959, and the highest level of activity since September, 1979. For 1983, housing starts are projected at 1.4 million. By year 2000, it is predicted that the worldwide demand for forest products will double.

McCulloch chains saws will be ready for this worldwide demand. No longer part of a larger business since being sold by parent company Black and Decker, McCulloch now

continued...



SHIPMENTS OF CHAIN SAWS, 5 YEARS

Except for 1982, figures include both electric and gasoline-powered chain saws.

Based on figures from the industry and the Chain Saw Mfrs. Assn.

Energy revolution ...continued

can focus on the world market as well as anticipating strong, upward growth keyed to the U.S.A.'s improving economy. So states Donald Marchese, president and chief executive officer of the McCulloch Corp. Marchese and a group of private investors, many of whom having been long-time McCulloch executives, announced McCulloch's purchase from B&D in April.

Despite the negative publicity attendant to being placed on the block in the waning months of 1982, McCulloch picked up an additional 4.7 market share from January, 1982 to January, 1983. Marchese credits two new lines of chain saws introduced in August, 1982 with capturing a major part of the market. These are the professional line developed for independent dealers, and the Eager Beaver line of lightweight, economical saws featured as "Best Buy of '82" by *Consumer Guides*. In describing McCulloch chain saws as market share leader, Marchese cites a January, 1983 Trendex report.

Husqvarna substantially ahead

Bucking chain saw industry trends, Husqvarna Division of Tecfor reports a 25 percent sales increase, says William Farrell, vice president. "Dealers and distributors across the United States and Canada experienced solid growth...the Rancher saws and our special carrying case promotion provided an extra shot in the arm across North America," according to Farrell.

This fall, Beaird-Poulan will concentrate a trade and consumer advertising campaign aimed at directing chain saw customers to the independent retailers. Trade ads will use the theme "We're out to give you, Mr. Dealer, your independence!" Beaird-Poulan believes in the good value and good service customers receive from the independent retailer. This company sells through independents exclusively, two-step, except to umbrella buying groups such as ACE and Cotter.

A COMPARISON OF KEROSENE VS. WOOD HEAT

	KEROSENE	WOOD HEAT
*Number of units in use in U.S. homes today	10 million	no total figure available
*Number of households using heating devices	7 million	24 million
Proportion of households using heating devices	one of every 12	one of every 3.48
*Average or typical price of heating device	$159 per unit	$437 per unit
*Average age of units in U.S. homes today	2 years, approx.	16% 1 yr. or less 63% less than 5 yrs.
*Heat production capability	8-15,000 Btus per hr.	15-70,000 Btus per hr.
*Average cost of fuel	$1.45 per gallon	$100 per cord, av. urban price
*Average amount of fuel used/household/year	68 gallons ($98.60)	2.5 cords ($250)
*Number of Btus per unit of fuel	130,000 Btus/gallon	24 million Btus/cord
*Cost/million Btus	$10.75 (99% efficiency of heating device)	$7.58 (55% efficiency of heating device)
Average cost to household for 15,000 Btus per hour	.16 per hour	.11 per hour
*Use by region	Most popular, Southeast Least popular, West Coast	Most popular, New England Least popular, Southeast**
*Predominant age group	All ages. Largest group, over 40 years of age	All ages. Largest group, 70% under 49 years of age
*Average income level of households using devices	Over $30,000	$20,000 to $34,999.

* Industry figures from the National Kerosene Heater Assn. and the Wood Heating Alliance

** According to the WHA, this region showed the greatest growth rate in 1982 for wood heating.
Ratios are based on 83,527,000 estimated total number of households, 1982, U.S. Dept. of the Census.

Selling well, looking good

Steve Moore, director of advertising for Beaird-Poulan, says that his company regards itself as No. 4 in the market share lineup and has no particular quarrel with that position. Business is good. Says Jerry Ryder, director of marketing, "Even in the heart of the economic slowdown, the Poulan 3400 counter-vibration chain saw has sold very well." Over 250,000 units sold as of Jan. 1, 1983—less than three years since this saw was introduced. And, according to Moore, the company "really is pleased with the sales of the 2300 AV & CVA, a chain saw that has brought added performance to the occasional-user market."

Value = price/performance/need

In consideration of the occasional user, Beaird-Poulan has conducted price-value studies to demonstrate that the non-pro chain saw owner can derive as much performance as is needed from a lower price, but quality saw. Buyers should determine whether they actually are getting the right features in terms of engine size, saw capabilities and life of unit for the saw's intended use. Moore says that, relating price-to-value, Beaird-Poulan chain saws are among the best in the business for the non-professional user. Not that they overlook the professional market; Beaird-Poulan's pro-saw demonstration program has been so successful that it will be expanded nationally this year.

Homelite market harvest

Homelite has assumed position as leader of the chain saw industry, having captured about one-third of the market in 1982. This is a position the firm has held for the last two or three years says Mike Isser, Homelite's PR spokesman, based on an analysis of figures from CSMA, figures published from another

continued on page 40

Shaping the message

continued from page 8

not only spring flowering bulbs.

Other functions, other associations

The functions of most of these industry groups, include activities in addition to the public relations efforts discussed here. They include market research, technical research, management and training services for members, forecasting of the outlook for the various industry segments, and lobbying, to name a few.

Also, there are other major industry groups related to the lawn and garden industry that perform some of those functions but are not involved in comprehensive or planned market expansion activities. These include the Outdoor Power Equipment Institute, the Outdoor Power Equipment Assn., and the National Lawn and Garden Distributors Assn. Although they have educational programs for their members that eventually have an impact on the consumer, their input of ideas and funds for public relations has been minimal.

Another new association, the National Lawn and Garden Manufacturers Assn., however, places a national public relations campaign high on its list of planned activities.

Cal Clemons, this association's executive director, believes that the manufacturers of the hardlines should support such efforts as the Fall Is For Planting campaign. But, he cautions they should not expect immediate results.

"The manufacturers and distributors should look at that as a program that will pay off in four or five years down the road," he said. "They should support it and consider it as an investment in the future." □

Energy revolution

continued from page 36

company and Homelite's own records.

Homelite will introduce two new chain saws at the National Hardware Show in August. Three new models ranging from 2.4 cubic inches to 4.1 cubic inches graced the line this year, but this company's most popular selling chain saws in 1982 were the Homelite 200 and 300, in the $250 and $399 range, respectively.

Sales spur in firewood

Beaird-Poulan, Echo, Homelite, Husqvarna, McCulloch, Stihl, Tanaka...are all important names on the chain saw market scene. Beginning in the late '70s, this market was given a boost when large numbers of people in the United States turned, again, to heating with wood. Today, according to wood industry figures, households that use wood for heat are six times more likely to own chain saws than the national average.

In the United States today, approximately one of every 2.38—42 percent—households uses some form of supplemental heat. Of these, 53 percent—one of two—heats with fireplaces; 16 percent—one of six—with a solid-fuel stove. Thirty percent, one of three, uses portable heaters; approximately one of five of those requiring supplemental heat uses kerosene for fuel. □

Columbia
NEW!
Sells as well as it seals!
Tire Seal
MTD

When you need packaged replacement parts... Columbia's the answer!

- BLADES • MUFFLERS • AIR FILTERS • TUNE-UP KITS
- FLYWHEEL KEYS • GAS CAPS • STARTER ROPES • WHEELS
- GRASSCATCHERS • TRIMMER LINE • AND MUCH MORE!

Circle (23) on Reply Card

NOTE

ONLY THE FOLLOWING PAGES OF THIS

PUBLICATION HAVE BEEN FILMED

Cover 1, p.1, 48, 50, 54, 56,

68, 70.

- C4725-2 8/26/83 -

AUGUST 1983

Lawn&Garden Marketing

A20800----SI EAS200 XXXXX LGM
F0090161000000XLB NY3
SRI
CONGRESSIONAL INFORMATION SER
4520 EAST WEST HIGHWAY
BETHESDA MD 2081

New? New Products Expo
What's New? New Products Expo

The BIG Hardware Show story

page 20

Growing the Market

page 6

AUGUST, 1983 VOL. 22, NO. 7 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.

17 **ABC's of Spring-flowering Bulbs.** Directions on bulb handling to reassure even the nervous novice. Includes new data based on recent tests.

New Product Exposition

24 **New Products Exposition. LGM** presents a cross-section of NHS New Products Expo entries for our readers' pre-NHS assessment. See these at the big show.

64 **The best defense...** Highlights of a seminar on product liability puts suppliers and sellers on guard.

8 **Winners and losers: retailers rank industry promos.** Suggestions for future marketing strategies are included. Seventh in the series of articles on Growing the Market.

20 **The big story of the big show—new products; expanded lawn and garden agenda.** NHS '83 will be bountiful for L & G.

50 **Product movement survey, spring, 1983.** Trends are indicated as retailers report recent performance of product lines.

54 **Compliance mowers: the first year.** Dealers give data, reactions, in an **LGM** survey of Spring sales.

60 **RTU bolsters chemical sales.** Report based on an **LGM** survey of wholesale distributors evaluates impact of ready-to-use packaging.

68 **Fun, color and quality.** Bedding plant business analyzed.

72 **Can welders use contact lenses? LGM** reprints a safety council article to quell concern among some OPE dealer groups.

80 **Mower servicing.** The Engine Service Assn. provides servicing dealers with compliance-mower aftermarket guidelines.

DEPARTMENTS

2 Editor's Notebook
6 Green Scene
17 ABC's of Spring-flowering Bulbs
48 Power Equipment Report
99 Reader Feedback Card
102 Book Reviews
106 People on the Move
108 Manufacturer's Literature
109 Calendar
110 In the News
112 Distributor News
114 Feedback

Coming in September: The Arett story, Growing the Market, a five-part special package. New product technologies that exemplify the state of the industry. ABC's of Blade-Brake Clutches.

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

Copyright 1983 INTERTEC PUBLISHING CORP. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, mechanical, electronic, photocopying, recording or otherwise without the prior written permission of the publisher. For information, address John Wickersham, 9221 Quivira Road, Overland Park, KS 66212.

Photocopy rights: Permission to photocopy for internal or personal use is granted by Intertec Publishing Corp. for libraries and others registered with the Copyright Clearance Center (CCC), provided the base fee of $2.00 per copy of article is paid directly to CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to publisher. ISSN 0091-4665/81 $2.00 + 0.00.

Power Equipment Report

Vol. 4 No. 7 August, 1983

OPEI elects new officers

David S. Rolston, president of the Wheeler Manufacturing Co., Harvard, IL, was elected president of the Outdoor Power Equipment Institute (OPEI) at its 31st annual meeting.

The OPEI is the national trade association representing manufacturers and component suppliers of consumer outdoor power equipment used around the home.

Rolston has been president of the Wheeler Co. for eight years and served as an officer of the Cotter Co., the parent company of Wheeler for 14 years.

David S. Rolston

Robert W. Reid

Warner C. Frazier

Jairo A. Estrada

Kendrick Melrose

Clarence H. Yahn

Robert W. Reid, manager, Outdoor Power Equipment Group (Lawn-Boy and Ryan) of the Outboard Marine Corp., was elected vice president. He is responsible for the convention sponsorship activities and future planning efforts of OPEI.

During his OMC career, Reid has represented the OMC Power Equipment Group as a director of OPEI and chairman of the technical and marketing committees.

Warner C. Frazier, president and chief executive officer of Simplicity Mfg. Inc., Port Washington, WI, and president of OPEI, was appointed to the executive committee for 1983-84.

The executive committee is composed of the president, vice-president, secretary-treasurer and one member of the board-at-large of the association.

Frazier has been in the consumer durables and industrial products field for more than 25 years in marketing and management positions at factory and retail levels. He has served on the board of directors of OPEI since 1980.

Jairo A. Estrada, president of operations of Garden Way Inc., Troy, NY, was elected secretary-treasurer.

Kendrick B. Melrose, president of the Toro Co., Minneapolis, and Clarence H. "Chuck" Yahn, president of Aircap Manufacturers, Tupelo, MS, were elected to the board of directors of OPEI for three-year terms.

1984 OPE industry outlook

INDUSTRY SHIPMENTS—4 product categories

	1980	1981	1982	Projected 1983	Forecast 1984
Walk-Behind Rotary Powered Mowers	5,700,000	4,600,000	4,600,000	4,500,000	4,700,000
(% Change)	−3.4	−23.9	0	−2.1	+4.4
Lawn Tractors/Riding Mowers	808,000	620,000	654,000	653,000	660,000
(% Change)	−5.8	−23.3	+5.4	−0.1	+1.1
Riding Garden Tractors	220,000	151,000	146,000	143,000	141,000
(% Change)	−13.4	−31.4	−3.3	−2.1	−1.4
Walk-Behind Tillers	667,000	501,000	497,000	490,000	494,000
(% Change)	+16.8	−24.9	−.8	−1.4	+.8

SOURCE: OPEI

Manufacturers of outdoor power equipment products, responding to a survey taken in April, forecast a 2 percent decrease in shipments of walk-behind rotary mowers for the 1983 model year, but an increase of 4.4 percent in shipments in 1984.

This and other data were reported to members of the Outdoor Power Equipment Institute during the annual meeting of the OPEI in June. The survey of the OPEI members was conducted by the Outdoor Power Equipment Marketing Group of Roper Corp., and was presented to the association membership by Jerome M. Stumbras, group vice president of Roper's Outdoor Power Equipment Marketing Group.

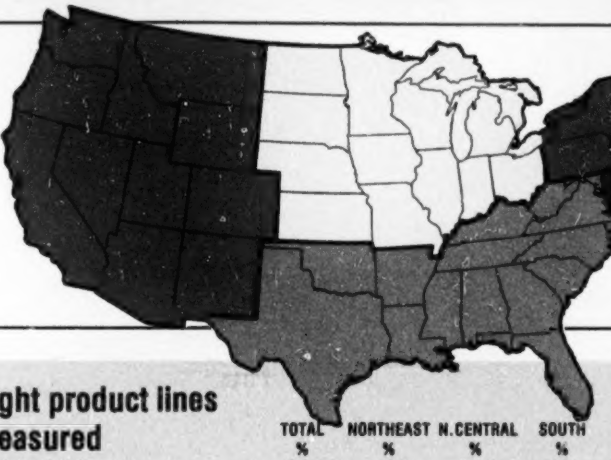
The report noted that industry shipments of these units through April were down 10 percent compared to the comparable period for 1982, but that a strong May and June push could bring the total shipment figure for the model year, which ends on Aug. 31, close to a level that would mean only a 2 percent decline.

The responses of 22 manufacturers were averaged to provide the data. Other highlights of the survey:

- Industry members are not projecting any major changes in sales of lawn tractors/riding mowers in 1983 or 1984. With the increase in shipments reported through April 1983, industry totals for 1983 could end up higher than member-forecasts.
- Based upon the Decembe 1982 OPEI survey on riding garden tractors, industry members projected a 2 percent decrease in 1983. Industry shipments of the tractors through April 1983 reflected a 16 percent decrease.
- Industry members project a 1 percent decrease in walk-behind tiller sales in 1983, followed by a 1 percent increase in 1984. Industry shipments through April 1983 indicate the yearly total could be below the industry projection of 490,000 units.

Product Movement Report, spring, 1983

Eight product lines sold through four key classes of retailers were measured by *LGM* to indicate trends but not to measure total retail sales volume.



Eight product lines measured

		TOTAL %	NORTHEAST %	N.CENTRAL %	SOUTH %	WEST %
Walk-behind Mowers		**87.0**	**89.8**	**87.3**	**86.2**	**84.4**
	Up	30.3	43.6	29.5	22.4	31.3
	Same	36.3	30.8	33.3	48.3	31.3
	Down	20.4	15.4	24.5	15.5	21.8
Riding Mowers/ Lawn Tractors		**71.0**	**69.2**	**69.6**	**77.6**	**65.6**
	-Up	22.9	28.2	22.6	27.6	9.4
	Same	31.6	30.7	29.3	32.8	37.4
	Down	16.5	10.3	17.7	17.2	18.8
Rotary Tillers		**77.5**	**80.0**	**83.6**	**71.8**	**64.7**
	Up	16.2	12.0	13.1	20.5	23.5
	Same	35.2	48.0	44.3	18.0	23.5
	Down	26.1	20.0	26.2	33.3	17.7
Replacement Parts		**97.9**	**100.0**	**96.7**	**100.0**	**94.1**
	Up	63.4	68.0	63.9	59.0	64.7
	Same	31.0	32.0	31.2	30.7	29.4
	Down	3.5	.....	1.6	10.3	.....
Garden Tools		**94.5**	**94.7**	**89.6**	**100.0**	**96.2**
	Up	24.9	36.8	16.4	24.0	30.8
	Same	45.9	44.7	38.9	62.0	34.6
	Down	23.7	13.2	34.3	14.0	30.8
Lawn Fertilizer		**94.5**	**97.4**	**91.0**	**96.0**	**96.2**
	Up	35.4	29.0	35.7	38.0	38.5
	Same	34.3	34.2	29.9	40.0	34.6
	Down	24.8	34.2	25.4	18.0	23.1
Grass Seed		**96.7**	**91.7**	**96.2**	**100.0**	**100.0**
	Up	30.4	41.7	26.9	32.3	9.1
	Same	35.9	20.8	30.8	51.6	36.4
	Down	30.4	29.2	38.5	16.1	54.5
Packet Seed		**95.7**	**95.8**	**92.3**	**96.8**	**100.0**
	Up	32.6	25.0	26.9	42.0	36.4
	Same	33.7	41.6	19.2	38.7	36.4
	Down	29.4	29.2	46.2	16.1	27.2

Because of multiple responses, percentages, do not add to 100%

	TOTAL	NORTHEAST	N.CENTRAL	SOUTH	WEST
Current Inentory of Walk-behind mowers (MEDIAN NO. OF UNITS PER STORE)	20 units	20 units	18 units	26 units	15 units

Retailers responding to the quarterly product movement survey reported an overall flat sales curve for the 1983 spring selling season. In six of the eight categories, retailers reported that sales were about the same as last year. In the other two categories, increases were reported.

Walk-behind mower sales were reported to be about the same as or better than last year by two-thirds of the respondents. Sales were up significantly in the Northeast, with one-sixth reporting increases of 15 to 24 percent and one-eighth reporting increases of 25 percent or more.

Riding mowers and lawn tractors sold about the same this year as last year, according to respondents. An increase was reported by a little more than one-fifth of the retailers. Sales fared better in the Northeast and South regions, where about 60 percent reported sales to be the same or better.

Summing up data for all regions, 35 percent of the respondents reported that sales of rotary tillers were about the same this year as last year. However, only 16 percent reported sales to be up, while 26 percent reported decreased sales, giving the overall picture a downward tilt. The South region showed the largest decrease, 33.3 percent. Of those, 17 percent reported sales to be down 50 percent or more.

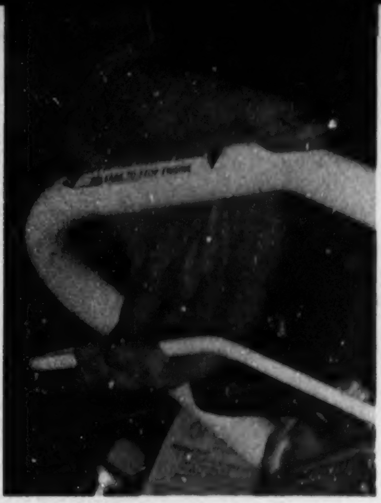
Replacement parts have continued in the boom stage they have been in for the last several seasons, especially in the Northeast. Nationwide, 63 percent of the respondents said sales were up, and only 3.5 said sales have decreased. Continued high sales of replacement parts indicates that many consumers are spending money repairing expensive power equipment, rather than buying new machinery.

Garden tools are holding their own, according to nearly half of the respondents, who said sales were the same as last year. Reports of sales increases outnumbered reports of decreases in the Northeast and South.

In lawn fertilizer, more respondents reported an increase than reported decreases. Most of those reporting increases said the increases were between 10 and 25 percent more than last year. A significant report of decreased sales (34 percent) came from the Northeast.

Grass seed sales were flat with 30 percent of the respondents reporting sales levels below and above last year's. The number reporting sales to be the same, 36 percent, was higher than those reporting decreases or increases. The West fared the worst, with 55 percent reporting decreased sales and 27 percent reporting decreases of 25 to 50 percent.

Packet seeds sold the same to better compared to last year in all regions except the North Central. Most of those reporting increases said sales were 10 to 25 percent higher than last year's.



COMPLIANCE MOWERS: the first year

Retailers, consumers, rebounding from sticker shock according to preliminary data from a special *LGM* survey on mower sales.

■This year of the massive introduction of the new compliance mowers brought many reports of sticker shock as the public eyed the higher prices on walk-behind mowers on the retailers' display floors. For the most part, however, data show that the retailers took the jolt from the mandatory standards in stride, and will be coming back for greater numbers when ordering 1984 models.

The scenario of the sales year was close to what manufacturers and retailers had expected: the non-compliance mowers, with their lower-price tags, had a higher percent of sell-through than did any of the categories of the new mowers.

Engine-kill, or clutch

All mowers manufactured after June 30, 1982, must have the 3-second blade stop, achieved either by killing the engine, or by stopping the blade with a clutch system. Of the compliance mowers, those with the engine-kill systems and rope restart were the lowest in cost, and were the most popular with the retailers and with their customers. (See table.) This lower-price category includes both those with the ERS (extended-rope start, sometimes called zone start) and the 360-degree foot-shield units.

Fifty-eight percent of the retailers responding to the survey handled the zone start compliance models, and 22 percent reported they handled the 360-degree foot-shield models. This category (includes Snapper and Flymo brands) does not require that the rope be high on the handle as is required of the zone starts. Fifty percent of the retailers responding to the survey handled the BBC units, and 43 percent handled the EAS units.

Convenience vs. price

The responses from the retailers show that price-oriented customers are clearly in the majority. But, when it comes to placing orders for the 1984 model year, the retailers indicate that higher priced, convenience-oriented models will edge up faster than the ERS and 360-degree shield models.

The EAS (electric-alternator start) models also will show a higher-percent gain. The data show that the number who planned to order more and the number who planned to order less of the zone start and of the 360-degree foot shield models was about equal at the time the survey was taken. It should be noted, nevertheless, that there still may be a stronger element of indecision among the BBC dealers. Twelve percent of these dealers gave no answer to the question asking if they would order "more," "same," or "less" units in their first orders for 1984. The data show that the "no answer" column representing the responses from the retailers of the lower priced engine-kill/rope-start units showed fewer responses: only 6 percent.

The data showed that the retailer inventory of non-compliance mowers—those manufactured prior to June 30, 1982—was significantly reduced. Three out of four of the retailers responding to the survey had the non-compliance units in stock at the beginning of the season. Sell-through of these units was good.

Quality questions

Responses from the retailers gave a mixed picture as to the question of the quality of the new generation of mowers. Many state that it will take two or three years in the field for the real picture of the quality of the blade-clutch systems to emerge. Meanwhile, however, there was no cohesive outcry from associations of retailers, distributors, manufacturers, government agencies, or media over extensive problems of quality or safety.

The isolated criticisms of retailers over the imposition of the safety standards and suggestions of serious safety problems that will result from the mandatory standards were balanced by retailers with just the opposite point of view. The latter category say that they can "sell safety" and that many customers are aware of the new devices intended to protect the operators of mowers, and seek them out. Profitability of the new mowers was somewhat hard to evaluate this year because of the availability of the non-compliance mowers. However, many retailers said the new mowers were as profitable or more profitable due to such features as easier-starting engines and safety devices. Other retailers would debate this question, and said the new mowers are harder to start, and overpriced.

Awkward, excessive controls

A frequent comment among the respondents to the **LGM** survey was the awkwardness of starting some models because of too many controls, or awkwardness of the positioning of the starting controls.

"Too hard to start; throws operator out of balance when pulling rope on top of the engine and holding down the bail on the handle," said one retailer. However, he said that consumer acceptance was better than he had expected. Other critical comments were typified by these:

"Zone start models still hard to start when hot..."

continued...

Table 1 – Retailers handling mowers

Type of mower	% handling
Zone start	58
360-degree shield	22
Blade-brake clutch	50
Elec. alternator start	43

Source: 1983 LGM mower survey (multiple answers – do not add to 100%)

Table 2 – Manufacturers marketing mowers

Type of mower	Number (mfrs.) marketing
Zone start	33
360-degree shield	2
Blade-brake clutch	9
Elec. alternator start	20

Source: November 1982 LGM survey of manufacturers (Some manufacturers produce more than one type of compliance mowers.)

continued from page 54

"Seems to be the same quality we've had in the past. We'll find out after these new units have been out a year or two."

"There are still wrinkles in the new engine design that have caused retailers some problems. (They include) the possibility of overfilling the oil chamber."

"Approximately 25 percent do not want to fool with extra levers, handles, etc."

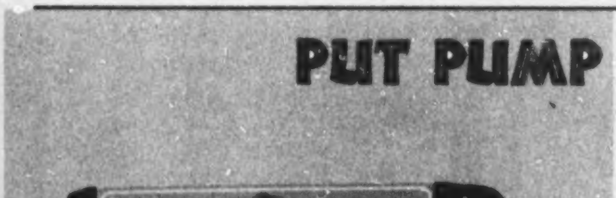
Need explanation

One dealer wrote, "Consumers accepted compliance mowers if the sales person took the time to explain safety facts and how the mowers work. I believe that the BBC type is going to be the best buy for the customers. I sold compliance mowers with no problem. I sold the mowers on the safety factors for children and women mowing lawns. Some dealers confused customers by having compliance and non-compliance mowers on display for sale."

One chain store with sales outlets in several midwestern and southern states started off the year with 5000 non-compliance and 1500 compliance mowers. This company reported quality as being good and profitability on the compliance units being *as* good as on the pre-compliance models. Another volume retailer perceived an "extreme dislike" for compliance mowers and handled only non-compliance units, selling 500 of its 800-unit beginning inventory.

Another chain with stores in seven or eight states started out with an inventory of over 7,000 units and reported that sales at the time of the survey had exceeded expectations by about 10 percent. This respondent said, however, that the true picture would not be known until the season was over.

Certain specialty retailers said they would discontinue selling mowers rather than handle the compliance units. One dealer said, "I expect compliance to be thrown out after the two-year trial period." ☐



PUT PUMP POWER ON YOUR DISPLAY COUNTER

The compact sales-starter from Little Giant features five popular small submersible pumps for fountains and waterfalls. And it's free with your pump order. . . specify pump display LG-2

Your customers already know the Little Giant name. Remind them to buy from you by stocking and displaying Little Giant small submersibles today. And all five pumps are U.L. listed.

Little Giant Pump Company
Subsidiary

P.O. Box 12010 • Oklahoma City, OK 73157 •
405/947-2511 • TELEX 748519

Remember to display
Water Wizard —
Little Giant's fast-selling
home utility pump!

WINNER 1983 GOLD DRUMMER AWARD FOR EXCELLENCE IN PROMOTIONAL DESIGN

Circle (29) on Reply Card

Fun, Color and Quality

Bedding plant business continues to expand

Although many of the trends and factors remained the same, the unusually late, wet spring weather may have affected some of the projections made when the article was written by Alvi O. Voigt in the pre-selling season for 1983.

■If "the best surprise is no surprise," then the 1982 bedding plant business had the best surprise and, so will 1983.

Bedding plant prices averaged about seven percent higher in 1982, not quite as high as earlier price advances from 1979 to 1981 at 8.5 percent to 11 percent when the economy was experiencing more severe inflation. About seven of every 10 BPI respondents achieved higher prices in 1982, fewer than 1979 to 1981; about three in 10 maintained similar prices in 1982 as in 1981. An expectation of bedding plant price increases averaging about five percent in 1983 seems reasonable with the lessening of cost-push influences of inflation and energy even though demand-pull effects continue unabated.

More BPI members enjoyed better sales in 1982 than in 1981 as four of every five members, 82 percent, recorded better sales in 1982 compared with 1981's three of every four. Comparatively better 1982 sales were even more encouraging when recognizing that BPI members were intending the second largest percentage increase in production on record. Respondents had indicated production intentions of 14 percent increases for 1982, second only to the 14.7 percent intentions for the 1978 season.

Production intentions for 1983 are a bullish 12.3 percent increase, about one percent above the 11.5 percent average over the years. However, there was about one in 14, 7 percent, of the respondents experiencing a worse sales year in 1982 than 1981, just slightly improved from 8 percent in '81.

continued...

Alvi O. Voigt is the agricultural economist and marketing specialist at the Pennsylvania State University College of Agriculture. This analysis is based on results of the thirteenth annual bedding plant survey of Bedding Plants Inc. members.

13-year sales trend

Year	Better Sales	Same-or-Better	Same Sales	Worse Sales
1970	78%	93%	15%	7%
1971	88	98	10	2
1972	89	97	8	3
1973	86	95	9	5
1974	95	98	3	2
1975	92	98	6	2
1976	88	98	10	2
1977	81	96	14	4
1978	73	90	17	11
1979	86	97	11	3
1980	84	95	11	5
1981	75	92	17	8
1982	82	93	11	7
Averages	84.4%	95.4%	10.9%	4.7%

Source: Bedding Plants Inc.

Not everyone in the bedding plant industry is enjoying a good market situation, but recently available U.S. Census statistics have documented the overall industry's dramatic almost-five-times growth from 1970 with $61.6 million producer value, to 1979 with $285.5 million. Since 1979 the USDA *Floriculture Crops* reports, for 28 states, when interpolated, might place the bedding plant industry producer value at $396.8 million in 1981, a 39 percent rise in the two years since the 1979 Census, almost an eighth of a billion additional dollars for the 1979-81 period.

Best-sellers ranked

In 1982 impatiens was the best-selling plant, as reported by more than one of four or 27 percent responding. The second best-selling bedding plant was the petunia, although petunias have constantly been losing ground, having been the best-selling item by 47 percent, almost half, in 1976 and dropping in 1982 to less than 22 percent or one in four respondents. Tied for third place were tomatoes and cutting geraniums, each at 16 percent, as best-sellers. A wider variety of other bedding plants was reported as 1982 best-sellers because, apparently, a greater diversity of product mix is occurring.

Impatiens continues as the dominant, planned-increase item for 1983, as usual. Geraniums from cuttings assumed more importance, grabbing second place from marigolds as marigolds dropped to a three-way tie for third place with vegetable plants and begonias. Petunias were in sixth place as a major planned-increase item for 1983.

Demand to continue in 1983

There's no doubt that markets have absorbed large consecutive annual quantities of bedding plants at sufficiently attractive prices to continue optimistic expansion by established and new growers. Caution and market analysis should be exercised by those individuals experiencing market difficulties that were not weather-related. A strong expansionist market is continuing but obviously not everyone will share in proportionate growth and success.

Incorporating BPI's production intentions of 1982, 14 percent, and 1983, 12.3 percent, to the 1981 United States' estimate of $396.8 million, producer value, 1983 could exceed one-half billion dollars at the grower level, and, roughly, $900 million at retail. This translates to $3.91 bedding plant expenditures per person for 1983. It would appear that a total market saturation point will not be reached in 1983, not with such an estimated, seemingly low, per capita consumption figure. In all likelihood, steady strong bedding plant growth will continue for some time to come. There's no reason to expect demand to soften; demand should continue strong, actually aided by an anticipated sluggish economy in 1983 as people turn more to gardening for food, fun and leisure.

Bedding plant sales comparison

For the last 13 years, BPI annually has surveyed its members to determine results of the current sales season. In comparison from previous BPI surveys, bedding plants in 1982 were judged as shown in table at left.

Eighty-two percent of the respondents in 1982 registered better sales than in 1981. Seven percent of the 1982 respondents recorded worse bedding plant sales than the previous year. So, 1982 had relatively improved sales from 1981 although somewhat below the 13-year averages. It should be stressed, though, that at least nine of every 10 or 93 percent of the respondents did record same-or-better sales in 1982, although slightly below the historic average of 95.4 percent.

Price increases less numerous

About 71 percent of the BPI members advanced their bedding plant prices in 1982, as price-increasing had slowed from the recent past (1979-1980-1981, respectively, 86 percent-91 percent-84 percent). However, scarcely any members, only one percent, actually lowered prices. Cost-push influences on price of inflation and energy had lessened in 1982 but the demand-pull influences on prices continue in most market situations. Price increases in 1983 may lessen from 1982 if inflation is not reignited. Note: prices largely will reflect the attentiveness and consequent adjustments of bedding-plant entrepreneurs in meeting customers' wishes. "It is always good strategy to understand customers and the market, and make appropriate business accommodations," commented Voigt. ☐

C4725-2A

OCTOBER, 1983

Lawn & Garden Marketing

MARKET DATA ISSUE

Lawn and Garden Growth Patterns

A20800----SI EA5200 XXXXX LGN
F009018100000XLB NY3
SRI
CONGRESSIONAL INFORMATION SERV
4520 EAST WEST HIGHWAY
BETHESDA MD 20814

BEST AVAILABLE COPY

OCTOBER 1983 VOL. 22 NO. 9 PUBLISHED 10 TIMES ANNUALLY

Lawn&Garden Marketing®

The merchandising magazine for lawn, garden and leisure living products.

12 **DIYers loyal to their lawns.** Preliminary data from the 1983 survey of consumers conducted by the Gallup organization show the number of households involved in lawn care, gardening and other aspects of home horticulture. For the first time dollar volume spent by households is reported by the GFA/Gallup study.

30 **Executive Forum: Growing the Market.** Comments from panelists and participants during a 90-minute forum on Growing the Market were edited to give diverse views and problems of media, suppliers and buyers.

8 **Changes sweep lawn and garden industry.** Data from a 1983 survey of retailers show changes in product mix, distribution patterns, decision making and other aspects of marketing. Successful new products helped offset declines in sales of some established product lines.

17 **ABC's of Snow Throwers.** Quick reference for retailers and their customers on fundamentals of walk-behind snow throwers.

22 **BBC mowers gaining?** An analysis and tables show results of survey of retailers about selling compliance mowers.

50 **President's viewpoint.** David Rolston, president of the OPEI, gives candid views on the state of the power equipment industry.

60 **Product movement report.** Quarterly survey of retailers covering eight key product categories.

70 **Association roster.** Annual updated listing and addresses of trade associations.

DEPARTMENTS

2 Editor's Notebook
6 Green Scene
17 ABC's of Snow Throwers
28 Power Equipment Report
30 Executive Forum
54 Calendar
62 New Products
76 Feedback
78 People on the Move
80 In the News

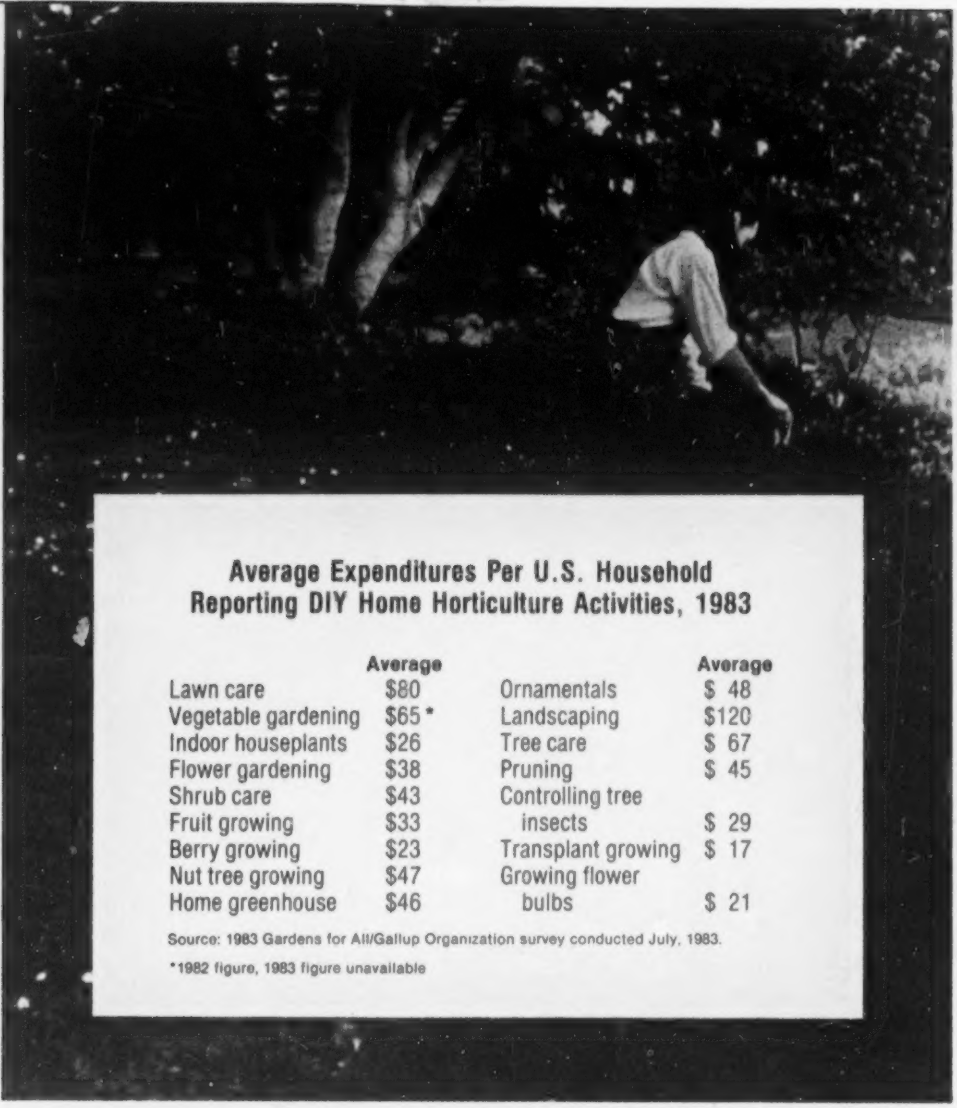
Coming in November/December: A major West Coast retail company. The benefits to the manufacturers, retailers and consumers of pre-spring lawn and garden product shows is featured. Consultant Ed Bobrow discusses new products and how to introduce them to the public. Also: The ABC's of Lawn Fertilizers and the annual calendar of events for 1984.

Postmaster: Return form 3579 to Lawn & Garden Marketing, P.O. Box 12942, Overland Park, KS 66212-0930.

Copyright 1983 INTERTEC PUBLISHING CORP. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, mechanical, electronic, photocopying, recording or otherwise without the prior written permission of the publisher. For information, address John Wickersham, 9221 Quivira Road, Overland Park, KS 66212.

Photocopy rights: Permission to photocopy for internal or personal use is granted by Intertec Publishing Corp. for libraries and others registered with the Copyright Clearance Center (CCC), provided the base fee of $2.00 per copy of article is paid directly to CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to publisher. ISSN 0001-4665/81 $2.00 + 0.00.



Average Expenditures Per U.S. Household Reporting DIY Home Horticulture Activities, 1983

	Average		Average
Lawn care	$80	Ornamentals	$ 48
Vegetable gardening	$65 *	Landscaping	$120
Indoor houseplants	$26	Tree care	$ 67
Flower gardening	$38	Pruning	$ 45
Shrub care	$43	Controlling tree insects	$ 29
Fruit growing	$33	Transplant growing	$ 17
Berry growing	$23	Growing flower bulbs	$ 21
Nut tree growing	$47		
Home greenhouse	$46		

Source: 1983 Gardens for All/Gallup Organization survey conducted July, 1983.

*1982 figure, 1983 figure unavailable

Photo credit: Reproduced with permission from the Ortho Book *All About Fertilizers, Soils & Water*, copyright 1979, Chevron Chemical Co.

DIYers loyal to lawn care tasks

■Sixty-three percent of U.S. households reported in 1983 some activities involving lawn care. Projections by **LGM** based on the averages reported spent by each household would show that, nationwide, approximately $4.24 billion was spent for DIY lawn care products. The projections are based on preliminary data from the Gardens for All/Gallup Organization 1983 survey. (Page 14 shows numbers of households engaged in lawn and garden activities.)

DIY landscaping totalled the second largest amount: $2.28 billion, averaging $120 per household.

At 63 percent, lawn care for the years of 1982 and 1983 is down slightly from the 65 percent reported in 1981, but because of population increases, the number of households caring for lawns remains about the same: approximately 53 million. This is a substantial increase from 1978 when this same annual survey reported that just 49 percent of the households indicated maintaining a lawn as a household activity. Numerically, about 37 million tended lawns that year.

Other types of DIY home horticultural activities decreased somewhat in 1983.

35 million growing vegetables

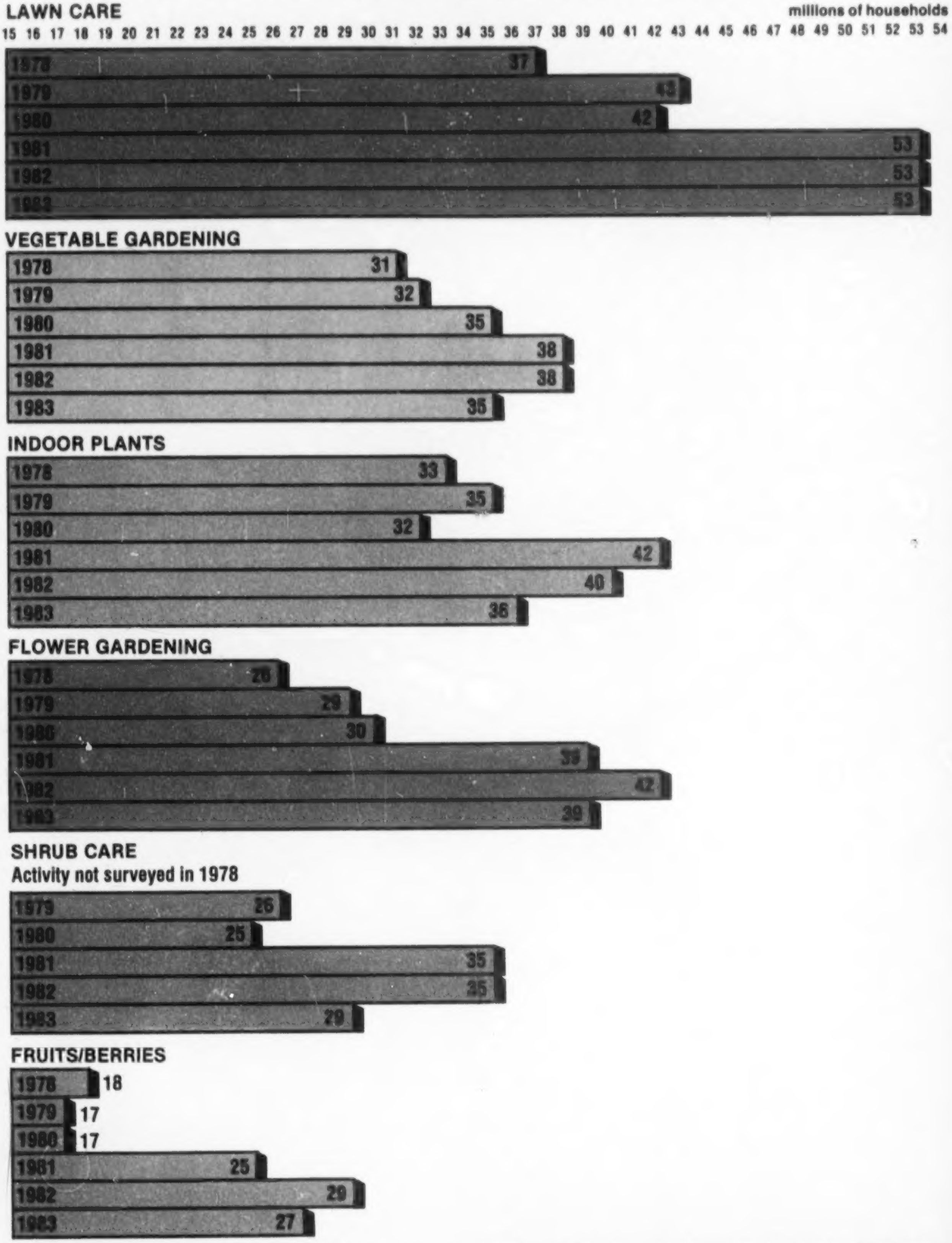
Vegetable gardening was down from 1982's 46 percent to 42 percent of all U.S. households in 1983. Even so, it continues to claim more than 35 million adherents. This is slightly above the 10 year average of 34-plus million food gardeners, according to Bruce Butterfield, research director, Gardens for All.

Forty-two percent is the lowest percentage of households reporting food gardens since 1978 when 41 percent of the households were producing edibles. Vegetable gardening peaked as did lawn care in 1981 with 47 percent raising food for their

continued...

6-year Comparison Study

Millions of U.S. Households Engaged in DIY Home Horticulture



Source: annual figures reported by the Gardens For All/Gallup Organization surveys, 1978 through 1983, and from the U.S. Bureau of Census. Figures have been rounded off and are therefore approximate.

BEST AVAILABLE COPY

DIY Horticulture-Related Tasks

	Households	
	1982	1983
Controlling tree insects	39%	32%
Pruning	34	29
Tree care	30	25
Landscaping	26	23
Raising transplants	18	15

Source: 1983 Gardens for All/Gallup survey.

DIYers loyal

continued from page 14

tables. This added up to 38 million, the highest number of gardeners in American history.

Who's who in the garden?

These are not faceless numbers. The survey tells types of householders who garden as well as how many. Comparing 1983 with 1982, there now are 1.1 million fewer households gardening where there are children in the home. Vegetable gardening lost .5 million single person households, and one million from among the families headed by someone separated, divorced or widowed.

On the positive side, vegetable gardening gained .6 million married couples without children living at home (retired or older parents, or childless couples). There has been a 24 percent increase among non-whites.

The biggest drop in vegetable gardening in 1983, was in the Midwest and West. Numbers of gardens in cities and rural areas dwindled less than in small towns and suburbs where gardening activities had surged during the past two years.

It is interesting that eight million households reported to the survey that they had discontinued gardening in the last year but the total numbers tallied to a drop of only three million from 1982 figures. This indicates that five million other households either renewed dormant gardens or started vegetable gardens for the first time.

Flowers, houseplants dip

Flower gardening dipped to 47 percent in 1983, the same percentage as two years ago after an interim climb to 50 percent in 1982. The biggest drop appeared in the South. Down by eight to nine points, southern flower gardeners now stand at 37 percent. From the Midwest, 57 percent reported raising flowers. This was the highest among the regions.

Shrub care and growing fruits, berries and nuts showed no significant drop in any one region.

Houseplants decreased five percentage points, 48 percent to 43 percent, in households nationally. Regionally, the only pronounced reduction was reported from the West where 10 percent fewer households now care for indoor plants. ☐

Associations

...continued

National Farm & Power Equipment Dealers Assn., 10877 Watson Rd., St. Louis, MO 63127, (314) 821-7220. William E. Galbraith, executive vice president.

National Fertilizer Solutions Assn., 8823 N. Industrial Rd., Peoria, IL 61615, (309) 691-2870. David K. Murray, executive vice president.

National Garden Bureau, Inc., 628 Executive Drive, Willowbrook, IL 60521, (312) 655-0010. Kathy Zar-Peppler, executive director.

National Housewares Manufacturers Assn., 1324 Merchandise Mart, Chicago, IL 60654, (312) 644-3333. Ron Fippinger, managing director.

National Hydraulic Wood Splitter Manufacturers Assn., c/o Piqua Engineering Inc., P.O. Box 605, 125 Clark Ave., Piqua, OH 45356, (513) 773-2464. Arthur St. Hilaire, president.

National Kerosene Heater Assn., First American Center, No. 15, Nashville, TN 37238, (615) 254-1961. J. Thomas Smith, managing director.

National Landscape Assn., 1250 I St., N.W., Suite 500, Washington, DC 20005 (202) 789-2900. Robert F. Lederer, executive vice president.

National Lawn & Garden Distributors Assn., 1900 Arch St., Philadelphia, PA 19103, (215) 564-3484. Thomas A. Fernley III, executive vice president, William L. Robinson, executive director.

National Limestone Institute Inc., 1840 Wilson Blvd., Suite 203, Arlington, VA 22201. James H. Williams, president.

National Pest Control Assn., 8100 Oak St., Dunn Loring, VA 22027, (703) 573-8330. Jefferson D. Keith, executive vice president.

National Sprayer & Duster Assn., 680 Wrigley Bldg. North 410 N. Michigan Ave., Chicago, IL 60611, (312) 321-1470. R. Howell, executive secretary.

Nebraska Assn. of Nurserymen, P.O. Box 3702, Omaha, NE 68103, (402) 892-3457. Harlan Hamernik, president.

Netherlands Flower-bulb Institute Inc., 90 West St., New York, NY 10006, (212) 227-2106. Robert F. LaRue, director.

New England Equipment Dealers Assn., Rt. 9, Page Road, Box 327, Bow, NH 03301, (603) 225-5510. George M. Becker, managing director.

New England Nurserymen's Assn., 30 Lafayette Square, Room #109, Vernon, CT 06066, (203) 872-2095. Larry Carville, executive secretary.

New Jersey Assn. of Nurserymen Inc., 233 Blake Hall, P.O. Box 231, Cook College, Rutgers University, New Brunswick, NJ 08903, (201) 828-2325. Larry D. Little Jr., secretary.

New York State Nurseryman's Assn., 230 Park Ave., New York, NY 10017, (212) 685-4579. Margaret Herbst, executive secretary.

Ohio Nurseryman's Assn. Inc., 2021 E. Dublin-Granville Road, Suite 185, Columbus, OH 43229, (614) 431-2452. Bill Stalter, executive director

Oklahoma Turfgrass Research Foundation Inc., 3318 Maloney Dr., Oklahoma City, OK 73121, (405) 427-1454, days. Don Parcel, secretary.

Oregon Assn. of Nurserymen, 2780 S.E. Harrison, Milwaukie, OR 97222, (503) 653-8733. Dan Barnhart, executive director.

Oregon Fine Fescue Commission, 2140 Turner Rd., S.E., Salem, OR 97302, (503) 585-1157. David S. Nelson, administrator.

Ornamental Growers Assn., P.O. Box 112, Fox River Grove, IL 60021, (312) 546-9222. Cindy Jakymiw, executive secretary.

Outdoor Power Equipment Assn., c/o B&K Mowers, 6002 Maple, Omaha, NE 68104, (402) 553-2083. Bill Kiebunde, president.

Outdoor Power Equipment Distributors Assn., 1900 Arch St., Philadelphia, PA 19103, (215) 564-3484. John W. Kane, executive director.

Outdoor Power Equipment Institute Inc., 1901 L St. N.W., Suite 700, Washington, DC 20036, (202) 296-3484. Dennis C. Dix, executive director and chief operating officer.

Outdoor Power Equipment Service Dealers Assn., c/o Dobosh Service Center, 5167 Brownsville Rd., Pittsburgh, PA 15236, (412) 892-2245. Sally Davis, secretary-treasurer.

The Pennsylvania Nurseryman's Assn., 234 State St., Harrisburg, PA 17101, (717) 238-1673. Charles V. Sala, executive director.

Perlite Institute Inc., 45 W. 45th St., New York, NY 10036, (212) 382-0070. R. S. Milanese, managing director.

Point-of-Purchase Advertising Institute, Two Executive Drive, Fort Lee, NJ 07024, (201) 585-8400. John M. Kawula, vice president.

Produce Marketing Assn., 700 Barksdale Plaza, Newark, DE 19711, (302) 738-7100.

Professional Grounds Management Society, 7 Church Lane, Suite 13, Pikesville, MD 21208, (301) 653-2742. Allan Shulder, executive director.

Professional Lawn Care Assn. of America, 1225 Johnson Ferry Rd., N.E., Suite B-220, Marietta, GA 30067, (404) 977-5222. J. Martin Erbaugh, president.

Rhode Island Nurseryman's Assn. Inc., 316 Woodward Hall, University of Rhode Island, Kingston, RI 02881, (401) 792-2791. John J. McGuire, executive secretary.

Small Engine Dealers Assn. of San Diego, 81-405 Hwy. 111, Indio, CA 92202, (619) 347-3155. George Sakemi, president.

South Carolina Nurseryman's Assn., Horticulture Dept., Clemson University, Clemson, SC 29631, (803) 656-3405. J. P. Fulmer, executive secretary.

continued...

BBC mowers gaining?

Sales and outlook for 4 types of compliance mowers based on 1983 LGM survey of retailers.

By Marjorie Riggin.

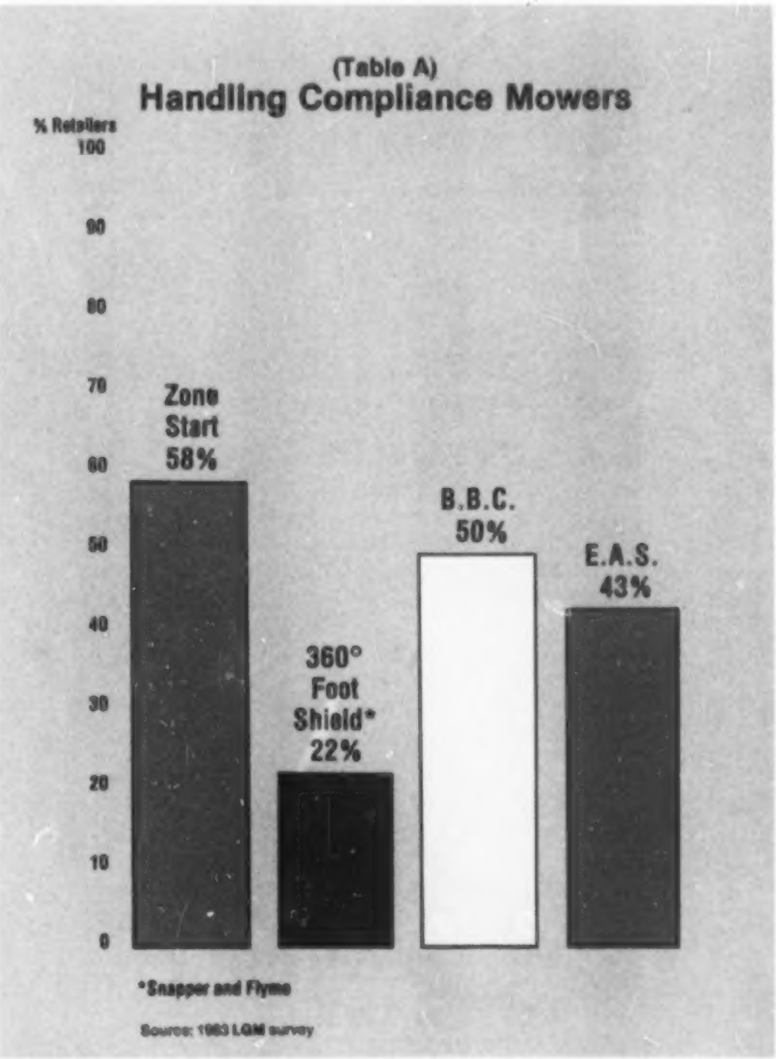
■Somewhere between the rainbow and the doomsayers stand the results of the compliance mowers' first year on the market. But where?

Data gained in a survey in mid-season point to a gain in market share by BBC units.

Questionnaires on this subject were mailed to multi-department stores, hardware/home and power equipment retailer-recipients of **Lawn & Garden Marketing** magazine. Responses from the group reflected dealer attitudes and public acceptance as being on the positive side.

Zone starts moving

More zone start mowers are stocked by responding retailers than the other three models. Of the 58 percent (see Table A) that handle these mowers, the highest regional percentage—73 percent—reported from the West, compared with 58 percent from the Northeast, 58 percent, North Central, and 47 percent, South.



(Table A)

Handling Compliance Mowers

*Snapper and Flymo

Source: 1983 LGM survey

Among the three categories of retailers surveyed, 60 percent of the responding hardware/home center dealers handle zone start mowers, 59 percent of the power equipment dealers and 50 percent, so reported by multi-department stores.

Cutting a sales swath

Snapper and Flymo are the only two companies manufacturing 360° foot shield mowers. Twenty two percent of the responding retailers, all regions, reported handling this style of compliance mower with the fewest of these, 13 percent, from the South. Other percentages of those stocking the 360° foot shield option mower: 35 percent, West; 33 percent, Northeast and 17 percent, North Central regions.

Compared with mowers of the other three complying designs, this type of mower met sales expectations of the highest percentage nationally of responding retailers, 59 percent (see Table C).

BBC moving up

Of the 50 percent reporting that they handle blade-brake clutch mowers, more than half—56 percent—are hardware/home dealers. Distribution among the regions is fairly even: 51 percent, Northeast; 56 percent, North Central and 54 percent, West. Only the South indicated a markedly lower 32 percentage of retailer-respondents carrying BBC units.

Reordering plans for BBC's to be sold in 1983-'83 were expressed by a larger percentage of respondents—37 percent—than were indicated for other types of compliance mowers (see Table C). An equal 37 percent will order the *same* number of BBC's as in 1982-'83, however, and 14 percent plan to order fewer of the BBC mowers.

Northeast best for EAS

Fewer than 50 percent of the retailers selling compliance mowers who replied to the survey stock the

continued...

DIXON ZTR mowers turn on sales, turn on profits, turn on a dime.

DIXON ZTR mowers sell as quick as they mow— and just as easy. Since 1974, Dixon's Zero Turning Radius "mowbility" has been selling itself. Still, every Dixon Dealer is backed with a quality lineup of 5 competitively priced models, strong national and local advertising, free Yellow Pages, and generous co-op terms.

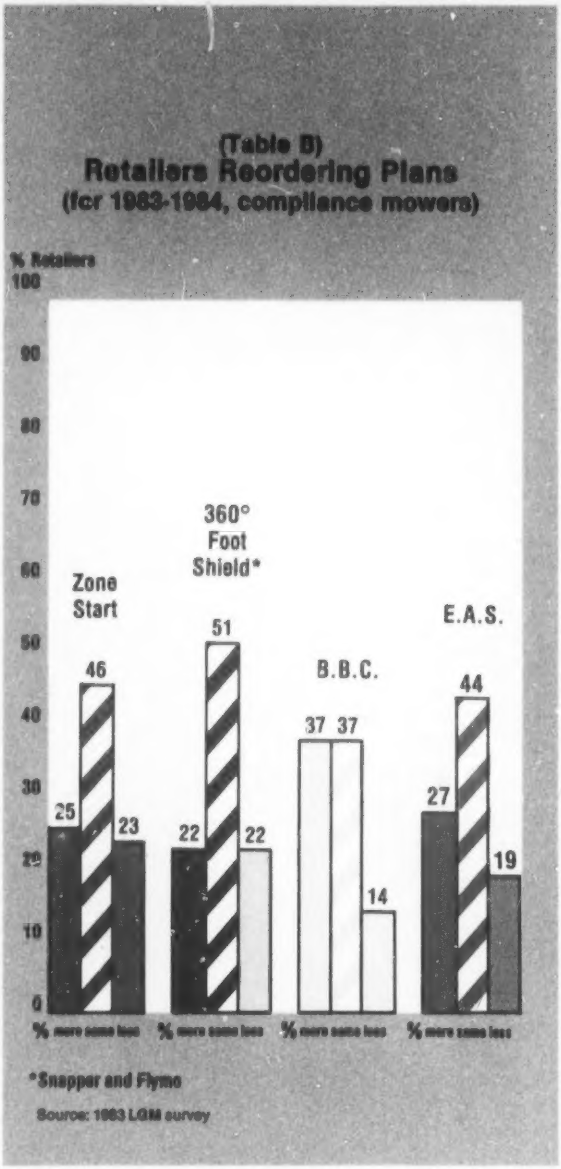
Best of all, you won't find a Dixon Dealer on every corner. We give you room to grow... we know you'll need it!

Dixon Industries, Inc.
Box 494, Dept. LGM
Coffeyville, Kansas 67337
(316) 251-2000

DIXON ZTR 10 Anniversary 1974-1984

Dixon Industries, Inc.

Circle (13) on Reply Card


(Table B)
Retailers Reordering Plans
(for 1983-1984, compliance mowers)

*Snapper and Flymo

Source: 1983 LGM survey

BBC mowers ...continued

electric alternator start unit. Totally, 43 percent; regionally, an equal 46 percent in the Northeast, North Central and West. Fewest—26 percent—retailers responding from the South confirmed that they carry the EAS. As to types of retailers, fewer multi-department stores, 27 percent, handle EAS than do the hardware/home, 38 percent, and power equipment dealers, 57 percent.

EAS mowers appear to sell best in the Northeast, where 70 percent of the reporting dealers show sales amounting to 75 percent or more of their inventory. Also in the Northeast, sales met the expectations of 65 percent of the dealers.

Quality, profit and acceptance

Survey questions eliciting specific, written responses concerned:

- Compliance mowers' profitability
- Consumer acceptance of compliance mowers
- Compliance mowers' quality

continued...

BBC mowers

...continued

Sixty five percent of the responding dealers made positive comments about the quality of compliance mowers, generally, and were conspicuously loyal to the lines they carried. Only 23 percent of the comments are negative; the remaining 12 percent, neutral. From the Northeast, a multi-department store dealer says, "Excellent—we had no problems"; power equipment dealers say, "No problems to date on zone units," and "(Safety) is a large selling factor." But a pithier comment from a PE dealer in this region labels both "cheap" compliance mowers and "some better known names" as "junk."

From around the country concerning quality: "...there are only three extra parts...so they are as good (I feel better than) non-compliance mowers." "Our line is very good quality...you can't beat it." and "Good, especially (our) blade-brake clutch system." A southern dealer writes "Same quality, with a slight decrease in repairs," but a dissenting North Central voice: "Extensive use of plastic controls does not look durable."

Can the unconvinced convince?

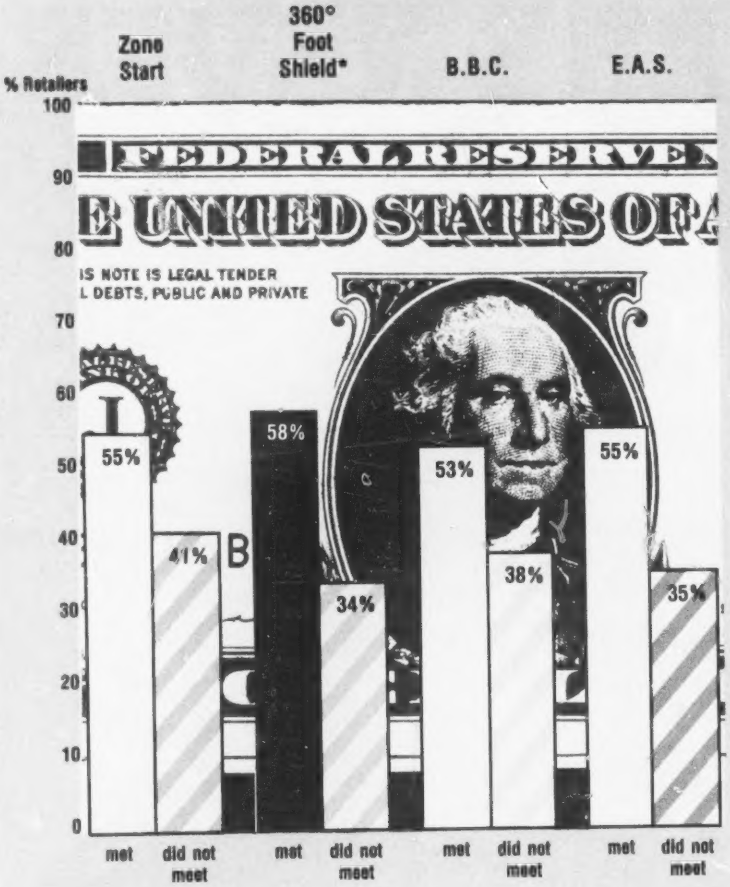
Comments on consumer acceptance of the compliance mowers ranged from assuredly positive to determinedly negative. From a power equipment dealer in the Northeast where positive comments outweighed the negative by 40 percent, came this perceptive assessment,

"Consumers accepted compliance mowers if the salesperson took the time to explain how they work, and the safety factors." A North Central dealer writes, "Well accepted, if they are sold with a **positive** attitude."

North Central responses, however, were 54 percent more negative than positive on this score, indicating that their customers are not necessarily as "compliant" as the mowers.

(Table C)

How Sales Met Expectations 1983-1984



*Snapper and Flymo

Source: 1983 LGM survey

In the South, with 25 percent more negative than positive responses, compliance mowers were "forced on customers," according to one dealer, but "sold by the satisfied customers" of another. Although the West leaned toward the positive, price was an objection. A mixed comment pointed out "Consumers accept the compliance features but resist the accompanying price increase." From all the regions, price was mentioned as a problem in many of the negative responses.

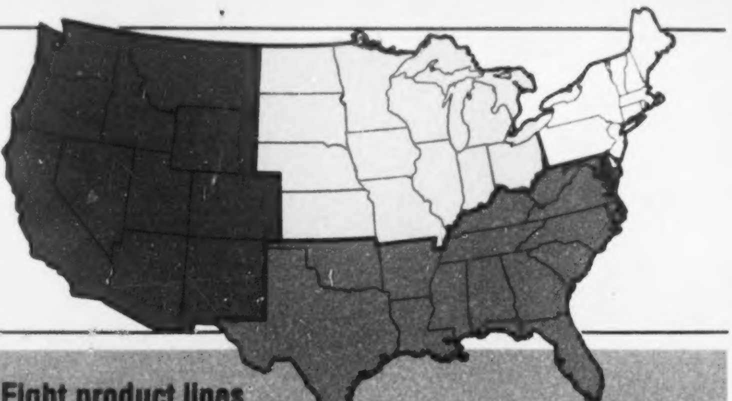
Profitability an issue

The question of the mowers' profitability raised some hackles, especially in the North Central and South regions. A southern power equipment dealer unknowingly countered the highlighted quotes when he wrote," ...if the dealer now has to spend more time selling and explaining the features of these machines, the profit structure needs to be revised to a minimum of 25 percent for the dealer." A few were satisfied; many more gave neutral or negative responses in the ratio of three of every 10 responses, positive, and seven of every 10, either negative or neutral.

Asked for additional comments, dealers leaned toward non-compliance mowers, with a North Central PE dealer decrying the compliance mower law as "a shame!"

Concerning this survey, a North Central PE dealer writes, "...now we can see how the other dealers are doing—and it just doesn't show how many (mowers) the manufacturers made." ☐

Product Movement Report
summer, 1983



Eight product lines measured

		TOTAL %	NORTHEAST %	N. CENTRAL %	SOUTH %	WEST %
Walk-Behind Mowers	Up	31.1	26.5	19.9	45.0	43.2
	Same	36.6	42.9	37.6	31.7	34.0
	Down	20.5	16.3	26.7	16.6	16.0
Riding Mowers/LTs	Up	33.8	20.6	33.3	55.6	20.9
	Same	29.8	44.2	24.6	22.1	33.3
	Down	26.5	26.4	33.3	16.7	25.0
Spin Trimmers	Up	42.5	36.9	41.6	46.7	45.5
	Same	30.6	40.8	22.8	31.6	36.3
	Down	11.9	8.0	15.0	11.7	9.1
Replacement Parts	Up	63.5	67.7	54.4	66.7	75.0
	Same	27.9	29.4	31.5	22.2	25.0
	Down	6.0	.....	10.6	8.3	.....
Chemicals	Up	34.1	20.0	32.0	37.6	45.0
	Same	38.7	46.6	36.1	45.7	30.0
	Down	12.6	26.7	11.5	8.4	10.0
Herbicides	Up	33.0	26.4	12.8	54.6	36.4
	Same	43.5	47.3	55.0	24.3	63.6
	Down	13.9	21.0	22.5	6.0	.....
Insecticides	Up	40.4	26.3	41.9	51.6	27.3
	Same	37.3	31.5	41.9	27.3	63.6
	Down	17.0	36.9	16.2	9.0	9.1
Garden Tools	Up	16.0	21.1	12.9	21.3	.....
	Same	61.6	63.0	67.8	45.3	90.9
	Down	17.1	15.9	12.9	24.3	9.1
Watering Equipment	Up	41.7	61.6	50.7	29.9	19.3
	Same	37.1	26.7	30.6	36.7	64.6
	Down	10.5	5.8	6.7	15.9	16.1
	Because of multiple responses, percentages do not add to 100%					
Current inventory of walk-behind mowers (median no. of units per store)		16 units	17 units	13 units	18 units	14 units

**The mass merchandisers' and hardware/home centers' questionnaire asked for information on horticultural chemicals. The questionnaire to garden centers broke down horticultural chemicals into herbicides and insecticides.*

Eight product lines sold through four key classes of retailers were measured by **LGM** for this survey.

■The season just completed was a better one for retailers of lawn and garden products than was the spring and summer of 1982, according to respondents to **LGM**'s product movement survey. That is the overall picture for the summer months, although there were many regional variations in sales trends, due primarily to weather.

Walk-behind mower sales nationwide were reported to be the same or up by two thirds of the respondents, 10 percent more than for the same period in 1982. In the Northwest, 10 percent more reported increased sales. In the South and West regions, the number of respondents indicating increased sales was about double compared to last year. Sales were down in the North Central region, but have shown a tiny gain over last year. Spring sales were reported to be much higher, at 44 percent, which is normal. The North Central region was hit particularly hard by the summer drought and includes cities such as Detroit that are still mired in economic difficulties.

Inventories of walk-behind mowers are up a bit, most notably in the South. Fewer retailers reported zero inventory than last year. This year 5 percent reported zero inventory, compared with last year's 10 percent.

Riding mower/lawn tractor sales are improving overall. As prices on walk-behind mowers rise closer to prices for riding mowers, riding mowers may be stealing some walk-behind sales. Nearly two-thirds of the respondents reported sales to be up or the same, a 6 percent increase over last year. Sales are up in the South and the same in the North Central. Although more respondents from the West reported sales to be down (25 percent) than up (21 percent), this is a big improvement over last year, when 75 percent reported decreased sales. The Northeast region reported sales to be down. As with the walk-behind mowers, spring sales were better.

It's been a good year for spin trimmers. More retailers are carrying them and more are reporting increased sales. Though last year's report showed good sales, 15 percent more of this year's respondents reported sales to be up.

Replacement parts sales are still in a boom stage, but the boom appears to be leveling off, as the increase in sales of new mowers would indicate. Parts sales are increasing, but the rate of increase has slowed.

Chemical sales were surveyed in multi-department and hardware/home stores, while garden centers were surveyed on two types of chemicals, herbicides and insecticides. These categories were reported to be up overall, except in the Northeast, where chemicals and insecticides were reported to be down, and in the North Central, with herbicides reported down.

Watering equipment sales increased, probably because of the drought. Sales were up significantly in the Northeast and North Central, up slightly in the South, and about the same in the West. ☐